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ABSTRACT

This bibliographic review is a guide to publications on literacy in developing countries, which are available in English, French, Spanish, and German. Section I focuses on literacy and its relationship to orality. Section II addresses the interdependence of literacy and development. Definitions and conceptual approaches to literacy are discussed in Section III. Section IV groups theory and practice featuring learners, potential learners, and dropouts around the quantitative dimension and the qualitative dimension (selection, motives, learner characteristics, and dropouts). Section V discusses literacy learning, schooling, and alternatives. The focus of Section VI is on organization for literacy provision. Section VII analyzes and groups experience and insights gained through local, national, and global action, reflection, and transformation under the following sections: language issues, content of literacy programs, literacy methods, materials and media in literacy, training of literacy personnel, and evaluation. Challenges and issues are discussed in Section VIII. Each section, and each individual topic in Section VII, concludes with a list of references. A total of 923 references are provided. An index of authors and editors is appended. (YLB)

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BULLETIN

DU BUREAU INTERNATIONAL D'EDUCATION
OF THE INTERNATIONAL BUREAU OF EDUCATION

Literacy in developing countries: an analytical bibliography

Prepared for the
International Bureau of Education by the
Unesco Institute for Education,
Hamburg
(Ursula Giere, Adama Ouane and A Mahinda Ranaweera)

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PREFACE

This special issue of the *Bulletin of the International Bureau of Education*, prepared by the Unesco Institute for Education (UIE) in Hamburg, is published on the occasion of the forty-second session of the International Conference on Education and during International Literacy Year.

I should like to thank my three colleagues at UIE – Ursula Giere, Adama Ouane and A Mahinda Ranaweera – who have prepared this analytical bibliography concerning the increasing amount of literature on literacy in developing countries. Such an analytical survey could not have been made without the professional and technical collaboration we have received from the International Bureau of Education.

I am convinced that this publication will be a useful instrument for intellectual co-operation between decision-makers, researchers and practitioners. It should help all of us, from different perspectives and from different countries, to have a better grasp of some crucial issues and a closer acquaintance with research and practices in other regions of the world. It may give an opportunity to discover unfamiliar and yet relevant dimensions of the complex reality of literacy.

The designations employed and the presentation of the material throughout the publication do not imply the expression of any opinion whatsoever on the part of Unesco concerning the legal status of any country, territory, city or area or of its authorities, or concerning the delimitations of its frontiers or boundaries.

PAUL BELANGER
Director
Unesco Institute for Education

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INTRODUCTION

Published on the occasion of the International Literacy Year (ILY – 1990) and in the context of the forty-second session of the International Conference of Education (Geneva, September 1990), this bibliography attempts to guide the reader through a selection of publications on literacy in developing countries produced in English, French, Spanish and German, drawn from the databases of Unesco Headquarters in Paris, the International Bureau of Education in Geneva and the Unesco Institute for Education in Hamburg.

Highlighting debates on controversial issues, drawing attention to significant ideas and gaps, pointing to the cyclic emergence and submergence of trends and policies in theory and practice, this analytical survey of the literature may help in identifying experiences from the past worthy of consideration among the follow-up activities of ILY designed to improve the situation of illiterate out-of-school children, youth and adults.

Assembled mainly around recent publications (together with some 'good old' classics) dealing with specific problem areas, and bringing together as many country experiences as possible to illustrate particularities of trends, this bibliography makes no claim to be exhaustive either geographically, in content or in time coverage.

Corrections of imbalances and other deficiencies are welcome and should be addressed to the authors at the Unesco Institute for Education, Feldbrunnenstrasse 58, 2000 Hamburg 13, Federal Republic of Germany.

Functional literacy in industrialized countries has already been covered in an analytical bibliography published by the Unesco Institute for Education in 1987.

We thank our colleagues from the International Bureau of Education who were involved at various stages of the preparation of this bibliography. We would also like to thank our colleagues from the Unesco Institute for Education for their co-operative spirit and hard work: to Beate Amrhein for preparing the bibliographical data and to Suzanne Musiol and Louise Silz for typing the manuscript. We are also thankful to Karin Günther-Hampel and Susanne Gräfin Lambsdorff for scanning the publications. A special word of thanks is due to Paul Bélanger for offering to write the section on evaluation

Ursula Giere
Adama Ouane
A Mahinda Ranaweera

I. ORALITY AND LITERACY

Why is the world community fighting for the eradication of illiteracy? The answer generally given is that literacy is a useful tool for mankind. It has frequently been associated with modernity and development; these two goals are themselves sometimes thought to be synonymous. But what are the precise advantages claimed for literacy and how does it relate to orality, to traditions which have at times been identified with the primitive (non-developed/underdeveloped) world?

This long-running debate has been conducted from a wide variety of starting points which posit, for example, the diametric opposition of orality and literacy, or see them as a chronological evolution or a simultaneous interaction.

From a broad literature analysis, the following aspects of the on-going discussion on this topic will be dealt with in this section:

1. Literacy and orality as means of communication; writing as a technology, as opposed to orality, about which authors differ as to whether to deal with it as a technology or as a human attribute linked with language;
2. The boundary line/interface, if any, between non-literate and literate cultures, and the means of transmitting verbal elements of culture in the oral tradition and setting; what are the means used in oral tradition?
3. The characteristics of writing and its influence on the organization of thought and the structure of social and economic life;
4. The differences, if any, between the literate and the non-literate mind;
5. New technology and new or secondary orality;
6. Perceptions of the importance of literacy and its relationship to power and the organization of society.

Literacy and primary orality:
global versus generational/inter-generational communication

Orality goes back to the origin of language and relies on the spoken word, while literacy has often been characterized as communication mediated through writing. Hence the invention of writing has been treated as part of the history of technological development. Writing is clearly a technology, a human endeavour which, like all technologies, constitutes a manipulation of the physical environment by man (Pattison, 1982, p. 24). The word writing, if not otherwise specified, is used in a generic sense to include reading and written algorithms.

Writing is the most complex of all ways employed by the human spirit to memorize, recall, create, participate in communities and search for knowledge.

> Like the more primary modes of communication – song, dance, and gesture, which it has succeeded but not replaced – the written word is both expressive and functional, belonging to the world of art and of everyday life (Resnick, 1983, p. 1).
>
> Since written communication has been central to the way we have defined ourselves as a civilization, it has appeared on the research agenda of almost all of our disciplines. Psychologists have been concerned with the way written material is processed by the reader, and rhetoricians with the ways in which persuasion proceeds through written discourse. Economists have investigated the benefits and costs of investment in education, while sociologists have paid particular attention to socialization and the effects of schooling (Resnick, 1983, p. 3).

Discussing literacy, Pattinson considers that speech is not a technology. If at all, it should be considered as a meta-technology, a technology of technologies. He asserts that it is false and confusing to assume that:

> . . . Speaking is a technology that competes with and is similar to writing and other mechanical means of dealing with language. From this error comes a hypothesis something like this: some cultures have the technology of speech – these are oral cultures; others have the more advanced technology of writing – these are writing cultures. Their superior technology fundamentally alters the mental and social organization of these written cultures just as the application of iron or steam revolutionizes human ideology and social structure (Pattinson, 1982, p. 24).

Social anthropologists, besides merely collecting texts resulting from oral tradition, have also added the contexts of oral poetry, oratory and the use of proverbs and riddles across cultures.

> These studies emphasize the different roles oral forms of knowledge transmission play in societies of different social organizations and cultural patterns, and illustrate ways in which literate forms are incorporated into the communication networks of societies that have formerly been primarily oral . . . THUS improving descriptions and analysis of patterns of the co-occurrence of oral and literate traditions with each other and with other societal features (Heath, 1984, p. 41-42).

Literate and non-literate culture

There is no agreement about actual boundary lines between non-literate and literate cultures. More and more authors reject the traditional dichotomy between them. This distinction is no longer valid, even if it ever was. The intrinsic nature of oral communication has a considerable effect upon both the content and the transmission of the cultural repertoire.

> The transmission of the verbal elements of culture by oral means can be visualized as a long chain of interlocking conversations between members of the group. Thus all beliefs and values, all forms of knowledge, are communicated between individuals in face-to-face contact; and, as distinct from the material content of the cultural tradition, whether it be cave-paintings or hand-axes, they are stored only in human memory . . . The social function of memory – and of forgetting – can thus be seen as the final stage of what may be called the homeostatic organization of the cultural tradition in non-literate society. The language is developed in intimate association with the experience of the community, and it is learned by the individual in face-to-face contact with the other members.

> What continues to be of social relevance is stored in the memory while the rest is usually forgotten: and language – primarily vocabulary – is the effective medium of this crucial process of social digestion and elimination which may be regarded as analogous to the homeostatic organization of the human body by means of which it attempts to maintain its present condition of life (Goody, 1968, p. 29 and 30-31).

Characterizing oral thoughts and expressions, Ong distinguishes the following properties:

- Additive rather than subordinative (as found in the Creation narrative and oral narratives);
- Aggregative rather than analytic (reliance on formulas to implement memory);
- Redundant or 'copious' (repetition of the just-said, keeps both speaker and hearer on the track);
- Conservative or traditionalist;
- Close to life experience;
- Agonistically toned (emotionally loaded);
- Empathetic and participatory rather than objectively distanced;
- Homeostatic (in search of equilibrium);
- Situational rather than abstract (Ong, 1988).

Reflecting on community-based education as an instructional system using a wide range of affordable traditional media in African settings, Adams mentioned the following: The media employed to transmit information and skills – folktales, dance, song, hobbies, etc. – are the same vehicles which sustain and perpetuate the cultural life of the community. There is no technological dichotomy between those tools used for learning and those required for participation in community life.

> However, a major related limitation of traditional learning systems – reflective of larger societal concern for continuity and tradition – is the exclusive focus on the child's adaptation to existing conditions and standards without concomitant concern for preparing children to cope with and, more important, to shape a future characterized by change (Adams, 1987, p. 17-18).

Literacy and modernity have often been considered as interchangeable with a scientific attitude. It is well known that science alone is inadequate for coping with experience. A number of literacy programmes have been criticized for working on the faulty assumption that they are dealing with ignorant and superstitious illiterates. In this case, as stressed by Ogunniyi:

> ...we would do well to first of all determine their level of perception and to proceed therefrom. Otherwise, we would only be touching them on the surface but not be reaching their inner being . . . People's perceptions about concepts relating to witchcraft, divinities, destiny, reincarnation, taboos, etc., as examined in this study, cannot be wished away. It is not realistic to expect people living under the influence of these supernatural forces to act and think as scientists without first of all creating some sort of amelioration or establishing areas of mutuality and differentiation between the two thought systems (Ogunniyi, 1987, p. 93-94).

Is the written word indispensable? That is the question raised by Enzensberger:

> Whoever poses it has to talk about illiteracy. The matter has one small catch however. The illiterate is never present when he is being discussed . . .

> Every third inhabitant of our planet manages to survive without having mastered the art of reading and writing . . . For the human race does not consist only of the living and the unborn but also the dead. Whoever remembers them has to come to the conclusion that literacy is not the rule but rather the exception.
>
> Only we, that is a small minority of people who can read and write, could think of looking upon those people who do not care to read and write as a small minority. A certain ignorance is revealed here which I cannot simply accept.
>
> On the contrary: upon closer consideration the illiterate appears to me to be almost a venerable figure. I envy his memory, his ability to concentrate, his cunning, his ingenuity, his tenacity and his fine ear. Please do not impute that I am dreaming of the good savage. I am not speaking of a romantic phantom but of people whom I have encountered. It is far from my thoughts to idealize them. I am aware of their narrow-mindedness, their mania, their inflexibility, their eccentricity.
>
> You will probably ask why a writer, of all people, wants to take the side of those who cannot read . . . but the answer lies close at hand! Because it was the illiterate who invented literature. His elementary forms, from the myth to the nursery rhyme, from the fairy tale to the song, from the prayer to the joke are all older than the written word. Without verbal tradition there would be no poetry and without the illiterates no books (Enzensberger, 1987, p. 96-97).

Characteristics of writing

Writing, in the ordinary sense of a coded system of visible marks enabling a writer to determine, in effect without limit, the exact words and sequence of words that a reader will generate from a given text, was an intrusion – though an invaluable intrusion – into early human existence, much as computers are today.

> It initiated what printing and electronics only continued, the physical reduction of dynamic sound to quiescent space, the separation of the word from the living present, where alone real, spoken words exist (Ong, 1985 in Baumann, 1986, p. 30).

Writing has very often been identified with simultaneous or concomitant changes in underlying social and intellectual structures. Effects are sometimes taken for causes in observing and analysing the relationship between literacy and social environment. The history of literacy shows that it grows first in urban settings and that it interacts with various social structures and practices. But it does not follow the same pattern of development in all cultures. Moreover, besides certain cross-cultural patterns, as pointed out by many authors (Goody and Watt 1968; Ong 1988; and others), there are various kinds of interfaces between literacy and orality, and various kinds and amounts of oral residue in the various transitional cultures. According to Ong, one of the most generalizable effects of writing is *separation*.

1. Writing separates the known from the knower. It promotes 'objectivity'. Any writing system does this, but the alphabet does so most of all, since it most thoroughly dissolves all sounds into spatial equivalents . . .
2. Whereas oral cultures tend to merge interpretation of data with the data themselves, writing separates interpretation from data . . .
3. Writing distances the word from sound, reducing oral-aural evanescence to the seeming quiescence of visual space. But this distancing is not total or permanent, for every reading

> of a text consists of restoring it, directly or indirectly, to sound, vocally or in the imagination.
>
> 4. Whereas in oral communication the source (speaker) and the recipient (hearer) are necessarily present to one another, writing distances the source of the communication (the writer) from the recipient (the reader), both in time and in space . . .
> 5. Writing distances the word from the plenum of existence . . . The immediate context of spoken words is never simply other words. The immediate context of textualized words is simply other words.
> 6. By distancing the word from the plenum of existence, from a holistic context made up mostly of non-verbal elements, writing enforces verbal precision of a sort unavailable in oral cultures . . .

This is also reflected in Olson's famous formula which we can paraphrase as: 'In writing, the meaning is in the text, and in speaking, the meaning is in the context' (Olson, 1977, p. 259).

> 7. Writing separates past from present . . .
> 8. Writing separates 'administration' – civil, religious, commercial, and other – from other types of social activities . . .
> 9. Writing makes it possible to separate logic (thought structure of discourse) from rhetoric (socially effective discourse) . . .
> 10. Writing separates academic learning (*mathèsis* and *mathèma*) from wisdom (*sophia*), making possible the conveyance of highly organized abstract thought structures independently of their actual use or of their integration into the human lifeworld . . .
> 11. Writing can divide society by giving rise to a special kind of diglossia, splitting verbal communication between a 'high' language completely controlled by writing, even though also widely spoken, and a 'low' language or 'low' languages controlled by speech to the exclusion of writing . . .
> 12. Writing differentiates grapholects, those 'low-language' dialects which are taken over by writing and erected into national languages, from other dialects . . .
> 13. Writing divides or distances more evidently and effectively as its form becomes more abstract, which is to say more removed from the sound world into the space world of sight . . .
> 14. Perhaps the most momentous of all its diaeretic effects in the deep history of thought is the effect of writing when it separates being from time (Ong, 1985, in Baumann, 1986, p. 37-43)

Studying the alphabet effect, Logan highlights the role of the phonetic alphabet as a writing system and a system for organizing information which has shaped thinking in Western culture. Using an alphabet is more than learning how to read and write. It also entails the ability to: (a) code and decode; (b) convert auditory signals or sounds into visual signs; (c) think deductively; (d) classify information; and (e) order words through the process of alphabetization (Logan, 1986, p. 21).

The literate and non-literate mind

Is there an intrinsic difference between the literate and the illiterate mind? This question was tackled by Scribner and Cole in their book entitled *The psychology of literacy*.

The authors quote Goody, Watt, Havelock and others who state that 'written language promotes abstract concepts, analytic reasoning, new ways of categorizing and a logical approach to language' (Scribner and Cole, 1981, p. 7). They wonder why authors writing on this topic do not present evidence to support the view that individuals in literate societies do, in fact, process information about the world differently from those in societies without literacy. As a result, they quote Piaget, who wrote that literacy may influence how society does its work but not the structures of mental operations.

The authors have conducted many research tests on the Vai people (of Liberia) and have found that, despite the psychology of literacy, they could not discover the 'literacy' phenomenon. Scribner and Cole conclude that the mental derivatives of literacy are not automatic. Much depends upon how the act of writing is embedded in the culture and the purposes for which it is used.

> The process of 'literacization' is not the same in all countries as the process of schooling; adults as well as children move from preliteracy to literacy in a variety of writing systems and though diversified learning experiences. Studies of the psychological effects of literacy converge with and can contribute to the broader area of interest on the effects of education obtained through schooling (Scribner and Cole, 1981, p. 13).

The growth of literacy:
its power and relationship to 'secondary' orality

Literacy is valued differently. Few people would now equate literacy with education: this is a move away from assumptions made by some historians. Anthropologists have in general been critical of the role attributed to literacy in the development of man and societies. Their 'eulogy' of non-literate societies rests on arguments different from the celebration of illiteracy by the proponents of the post-literate electronic age, the Gutenberg Galaxy, which is said to be making print obsolete. The opinions of both sides are based on the characteristics and the functions that the printed word and the literate society are supposed to perform. According to Musgrove:

> In oral cultures words are mixed up with things. Literacy extricates them. In preliterate societies names are not sharply separated from things named: they do not vary independently. When the name changes so does the thing. That is magic. It seems that with the rise of literacy – and perhaps especially with the rise of print – words were effectively separated from things. Descartes effected the final separation. Words and things now achieved their proper autonomy (Musgrove, 1982, p. 33).

Literacy has been very closely linked with power and domination on the one hand, and liberation on the other. Musgrove quotes Robert Bierstedt, who said that:

> No difference could be more fundamental than that between peoples who can read and write and those who cannot. The latter have customs but no laws, techniques but no science, religion but no theology (Musgrove, 1982, p. 18).

Literacy has been considered as a powerful tool in the hands of dominant classes in the process of empire building. But in general, literacy will give some protection to the weak.

> It fixes and freezes rules and agreements outside the influence of personal power; it makes them publicly accessible and open to verification. The illiterate man who cannot read and make reference to his rights is a highly vulnerable man even – perhaps especially – in an electronic age of computers which some have said makes literacy superfluous (Musgrove, 1982, p. 23).

The development of the written language, libraries, and the growth of public literacy are significant stages in the development of literacy. The advent and spread of literacy has an impact on fundamental thought processes and attitudes, on memory, on social and cultural organizations, etc. Ivan Illich and Barry Sanders analyze this process as the *Alphabetization of the popular mind*. The development of writing and the transformation of printing illustrate the steps through which the mind of the West has come into being. The role played by letters in the birth of a new kind of society can be studied on two levels:

> On one level, new ways of doing business, nourishing prayer life, and administering justice all become feasible through the written preservation of words . . . The second way letters changed a society – by their own symbolism getting under a culture's skin and changing social perception in terms of the written word – has been much less studied and is much more difficult to talk about (Illich and Sanders, 1988, p. 31).

Writing is a technology which, as for all means of communication, can influence content so strongly so as to be identified with it. This was what the late McLuhan was referring to in saying that the 'medium is the message'. With the advances achieved in the development of communication technology and the emergence and spread of computer technology, several authors (see, for example, Jean-Jacques Servan-Schreiber in his book *Le défi mondial*, 1980) suggest that it might be possible for people and countries with predominantly oral cultures and traditions to jump straight into the electronic age, overcoming the literacy stage based on writing.

In a book entitled *The muse learns to write: reflections on orality and literacy from antiquity to the present*, Havelock analyses the process from singing, recitation and memorization to reading and writing. He also wonders if – through the mass media and the new technologies – we are not going back to the former times of orality. He goes on to demonstrate that it is not a backward movement but a forced marriage or a remarriage between the resources of the written and the spoken word. He terms this the 'Oral-literate equation!' or 'The modern discovery of orality'.

Ong differentiates 'primary orality' from 'secondary orality', the latter being a new orality created in the present high-technology culture by telephone, radio, television, etc. He also concludes that orality needs to produce and is destined to produce writing. Therefore oral tradition, oral performance, genres and styles should not be termed 'oral literature'. Making such a comparison is rather like thinking of horses as automobiles without wheels. In this praise of the illiterate, Enzensberger, expressed the view that:

> The illiteracy which we eliminated has, as you all know, returned in a form which has nothing honourable about it any more. This figure which has already been ruling the social stage for a long time, is the secondary illiterate.
>
> Lucky he!: he does not mind the loss of memory from which he is suffering; he is filled with relief that he is not stubborn; he knows how to value the fact that he cannot concentrate on anything; he considers it to be an advantage that he does not know and understand what is happening to him. He is mobile. He is flexible. He possesses a strong, assertive will. We do not therefore need

> to worry about him. The fact that the secondary illiterate does not have any idea that he is a secondary illiterate contributes to his well-being. He considers himself to be well-informed, can decipher instructions, ideograms and cheques and moves in a world where he is hermetically sealed off from every challenge to his awareness (Enzensberger, 1987, p. 101).

A large number of research projects have been conducted on the influence of writing and particular types of scripts in the shaping of thought, the grouping of individuals, and the nature and forms of interactions between them. Literacy plays a significant role both in 'social and cognitive transformation' (Duranti and Ochs, 1986, p. 230).

It is difficult nowadays to imagine a society without literacy. The present 'dominant' civilizations are based on literacy, which is said to be structuring the modes of reasoning of human beings and influencing their modes of interacting, producing goods, services, communicating, using time and leisure, interpreting the past and projecting the future, etc. The place occupied by literacy, its function in a given society depends on the means of communication used and on the role literacy plays in the transmission of the value system and the achievement of what is termed quality of life by the members of the said society.

Literacy has penetrated societies differently and the societies have reacted differently to such an intrusion. They have handled this tool and moulded it according to their needs and internal stability reflecting the prevailing balance of power.

> The importance of literacy cannot be understood in isolation, or in terms of self-advancement or skills; rather, its significance lies in its relation to the transmission of morals, discipline and social values (Graff, 1981, p. 258).

Studying Literacy in Morocco, Wagner, Massick and Spratt attempt to provide a framework for understanding the 'culture of literacy' in Morocco, focusing on the variety of situations in which literacy comes into play in a country both traditional and contemporary, and how the use of literacy is mediated by individuals and institutions (Wagner, Messick, and Spratt, 1986, p. 239). They also examined:

> ...change through the concrete technology of literacy – its 'material culture' – where several examples serve to convey how, in a material sense as well, Moroccan literacy has shifted from a 'traditional' to a 'modern' form . . . Thus, within a complex society, be it Morocco or the United States, literacy may be 'mandated' by government authorities, but its acquisition and maintenance are surely dependent on the cultural beliefs, practices and history within which it resides.' (Wagner, Messick and Spratt, 1986, p. 258-259).

For societies with a predominantly oral culture, literacy cannot replace fully the traditional order. The question is whether these people can use the technology of literacy without the values and other elements or 'superstructures' mediated by literacy. According to Rivero:

> A crucial consideration is that literacy starts from the culture created by the illiterates and seeks to give it clear elements of educational autonomy, defining education from their perspective, taking into account their forms of cultural expression and rendering them capable of discovering and influencing their own reality, producing written knowledge through a process of collective creativity (Rivero, 1989, p. 446).

The popular and scholarly conception that literacy has powerful effects on thought and development, and the numerous other 'myths' about the potential of literacy are reflected in Graff's publications, particularly in his new book: *The legacies of literacy: continuities and contradictions in Western culture and society.* He seeks to reappraise, from a variety of perspectives (socio-cultural, historical and cognitive), the significance and role of literacy and schooling.

> The most striking continuity in the history of literacy that emerges from Graff's book is the way literacy has been used, in age after age, to solidify the social hierarchy, empower elites, and ensure that people lower in the hierarchy accept the values, norms and beliefs of the elites, even when it is not in their self-interest (or 'class interest') to do so (Gee, 1988, p. 205).

The literacy practices of a given group go beyond language and literacy, and are always fully embedded in their cultural and social practices. Questioning this reality and empowering people are the main objective of the emancipatory literacy as advocated by Paulo Freire:

> Reading the world always precedes reading the word, and reading the word implies continually reading the world . . . In a way, however, we can go further and say that reading the word is not preceded merely by reading the world, but by a certain form of writing it or rewriting it, that is, of transforming it by means of conscious, practical work. For me, this dynamic movement is central to the literacy process (Freire & Macedo, 1987, p. 35).

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II. LITERACY AND DEVELOPMENT

The use of literacy, its role in society and its importance for individuals and for inter-personal and societal relations, which have already been discussed in the debate about the contribution of literacy to the growth of the individual and the shaping of the 'modern mind', is further reflected in the long-standing question of the literacy/development relationship. The questions emerging here are many and complex, the core issue being the nature, goals and forms of development, the dichotomy between underdevelopment and development (about which opinions have diverged on the same lines as they have with regard to orality and literacy). As for literacy, development has also at times been equated with modernization. Hence, the question: Does literacy and, more generally, education (a societal institution based on literacy and charged, among other things, with a mission to spread and develop literacy) make individuals and societies 'modern', i.e., more rational, efficient and effective? The idea that development starts from scratch – just as education starts from a *tabula rasa* – was advocated by a certain school of thought. A criticism leveled against this statement is that development is not preceded by underdevelopment; they occur side by side. Similarly, some form of education has always existed within societies. Development and education are determined by the dialectic movement reflected in the continuous struggle for power and transformation.

Further questions can be asked: Development for whom and by whom? What comes first, literacy or development? Literacy and development are two companions navigating in turbulent waters stirred up by ideological confrontations, polemics, wild changes of course and virulent conflicts. Is there a causal relation between them? Does one precede and determine the other, or do they interrelate in some other way?

These are some of the questions often raised. And if one considers that there is no agreement about what development is or how literacy should be defined, the complexity and contradictory nature of the literacy/development relation is self-evident.

The role of education in promoting development and the reciprocal effect of development on education have been recurrent issues during the last few decades. Specialists from various disciplines have tackled the question from their own viewpoint, and the fluctuation and conflicting meanings attached to the two terms in play, namely 'education' and 'development' have shaped the interpretive paradigms of greatly differing theoretical schools. Their conflicting views are reflected in the dichotomies built around the following key words: adaptation, evolution, control and dependency on the one hand; conflict, autonomy, self-reliance, participation, transformation and empowerment on the other.

How does the change take place? Who is instrumental in this process and who benefits most? Equilibrium and conflict within society are the two main opposing camps challenged by a third opponent insisting on the role of the individual as initiator and actor of development (Altbach, Arnove and Kelly, 1982; Thompson, 1981; Sjöström and Sjöström, 1983; Duke, 1985).

Literacy is one of the means used by educational institutions to impart their objectives. Literacy is also one of the core objectives of education, as is reflected in any discussion about the concept of literacy. While being itself a part of education, literacy is also the vector used to convey the content, the messages, etc.

What is development?

It seems rather peculiar to raise such a fundamental question in relation to literacy. But this issue is central to what literacy is and to what literacy aims at.

The modern concept of development dates from the post-Second World War period. Development has been defined as a broad and complex concept related to economics, to society, to the individual, and more recently, to culture. Development has been used interchangeably with 'modernization', growth, change, conflict and transformation, and different theoretical approaches which predominated between 1950 and 1980 (Amin, 1989; Inkeles and Smith, 1974; Schultz, 1981; Thompson, 1981; Sjöström and Sjöström, 1983; Duke, 1985; Bhola, 1989).

> Although there were fierce scholarly debates during this period regarding the precise nature of national development, a fairly general consensus developed that it entailed at least three main components: (1) generation of more wealth within a nation (economic development); (2) the more equitable distribution of such wealth, or at least more equitable distribution of opportunity for access to that wealth (social development); and (3) the organization of political decision-making structures that would be close approximations of those prevalent in the West (political development) (Farrell in Altbach, Arnove and Kelly, 1982, p. 39).

From a linear, organic, cumulative, directional and purposive meaning (Sjöström and Sjöström, 1983, p. 6), development has shifted to the idea of self-reliance and liberation, conceived and managed by man in complete harmony with his moral and spiritual aspirations, making possible the full flowering of creative faculties.

Although the growth dogma is still prevalent in planning for development, reactions to this philosophy have been expressed by many opponents giving rise to attempts by opposing development schools to explain and, sometimes, to predict the nature of the development and change process. This opposition is due to the persistence of inequalities in many places, particularly in developing countries, in spite of considerable growth; it has also resulted from the insight gained through action about types of development, the goal of development and the process involved. After several decades of development assistance, it has become apparent that interventions seeking economic development in a context of gross structural inequalities have served largely to increase, reinforce and legitimize inequalities (Paulston and LeRoy in Altbach, Arnove and Kelly, 1982, p. 239).

A number of social scientists and 'developmentalists' have, accordingly, begun to rethink the aim of development and to propose alternative intervention strategies

(Nyerere in Hinzen and Hundsdörfer, 1982). The outer aspects of development are increasingly supplemented with references and criteria for inner development.

> Development efforts over the last two and a half decades have demonstrated that, however clever or generous the schemes, the local populace will not use them or profit from them unless it is internally motivated to do so. Nor will the intended beneficiaries of any plan carry it out unless it makes sense to them, meeting their needs as they see such needs. Their energies, allegiance, and values must be enlisted if programmes are to take root and sustain themselves on a continuing basis.
>
> Here again we encounter the question of values. To enlist popular participation and commitment, development programmes require a value-base that is meaningful to the people, relevant to their perceived needs, and affirmative of their inherent strengths (Macy, 1983, p. 20).

Unesco's more or less normative definition of development is reflected in one of the many publications of the organization on this topic:

> Development is *integrated*: it is an organic process involving a number of economic, social and cultural factors which overlap and constantly influence one another.
>
> Development is *endogenous*: each country carries out its development according to its own choice, and in conformity with the real values, aspirations and motivations of the population.
>
> Development is *global*: its objectives and problems are determined with relation to world problems and reflect the general nature of development (Unesco, 1982, p. 25).

Recent thinking on the evolution of the concept of culture, reflected in the intensive debate taking place over the last decade, incorporates the broad concept of development:

> As a result both of the development of scientific thinking and of the increasing awareness of the international community, the concept of culture, as reflected, for example, in the intergovernmental conferences on cultural policies, has been extended to include all the distinctive characteristics – spiritual and material, intellectual and emotional – of a society or a social group. The concept now transcends arts and letters, and encompasses life-styles and the modes of production of goods having an economic or symbolic value, fundamental human rights and individual or collective traditions and beliefs. Perceived in its historical dimension, culture is now seen to be the result of everything a society has created with the passage of time, and at the same time THE driving force of what it continues to create, shaping the sensitivity and collective imagination of its members (Unesco, 22 C/94, 1983, p. 1).

Education and development

The decades since the Second World War were termed the golden age of education.

> There appears to be no logical limit to the expectations we have for this single social institution. Education is called upon to alleviate poverty, to serve as the vanguard in directing social and economic change, and as the means for individual self-improvement. Particularly in new nations that are attempting to merge diverse and often competing ethnic and tribal groups into a unified nation, education is charged with providing the young with competencies required for

> productive participation in the modernizing economy; with mobilizing previously parochial populations to political consciousness; and with reforming the inequities of distribution by levelling the presently affluent while elevating the powerless (Bock in Altbach, Arnove and Kelly, 1982, p. 78).

Education encompassing literacy is a necessary component in the process of development of man and his surroundings. Its place in the process of social change and development was looked at either in isolation or in connection with other factors operating in various societies. As human learning is central to development, the focus of attention has, at times, switched mainly to human resources.

> By adding the 'advances in knowledge' residual to 'improvements in labour, quality', Denison attributes 42 per cent of the per capita income growth in the United States between 1929 and 1957 to investment in humans (quoted by Sobel in Altbach, Arnove and Kelly, 1982, p. 59).

Furthermore,

> Historical evidence deriving from studies of more advanced countries during their periods of rapid economic growth, and notably of the United States, the Soviet Union, Denmark and Japan, suggested that there had been a very significant relationship between their economic growth and the amounts and kinds of education provided to their workforce (Thompson, 1981, p. 86).

Colclough has provided a review of the evidence on how improved educational quality can advance economic growth:

> The evidence shows that the benefits of primary schooling arise from the cognitive and non-cognitive behavioral changes which the schooling experience brings . . . The implication is that even if resources are scarce, and if the affordable quality of schooling is low, a further extension of the coverage of primary education can still be expected to bring benefits. In this sense the evidence from fertility studies, and from studies of farmer productivity, suggest that the individual behavioural changes that result from schooling are stronger when literacy is widely spread than when it is more concentrated. There seems to be then an interactive effect between individual and community attitudes and values which significantly strengthen the economic and social case for universalizing access to primary schooling (Colclough, 1980, p. 20).

The validity and utility of such conventional interpretations of educations' effects have been strongly questioned in recent years by a growing number of social scientists, educators, and even some policy planners on both theoretical and empirical grounds. In addition, recent research has produced findings which indicate that the observed relationship between schooling and socialization outcomes may be largely a consequence of a complex interaction between internal school features and the larger social structure in which the school is located.

Concluding his remarks on the conflict of meaning between education and development, Bock mentions in this respect that:

> Education is a complex, often paradoxical, social institution, frequently serving contradictory functions simultaneously. Although it perpetuates existing patterns of domination in society, it also creates new social meaning, generates new categories of knowledge and, hence, new social roles, all of which challenge the legitimacy of the existing order. Schools do indeed socialize the

> young, but in an institutional context wherein rival social groups compete and struggle for power and status. Moreover, the nature of that competition for valued social resources determines the socializing power that different schools exert (Bock in Altbach, Arnove and Kelly, 1982, p. 98).

Education is not only a separate sphere of social life, it is a practice aimed at harnessing and challenging the full development of personal capacities in individuals (Gintis, 1984).

How does literacy relate to development?

Change, literacy and development are interdependent. Literacy, like schooling, is a dynamic concept, defined as much by the perspectives from which it is viewed as by the social, political, historical, communicative and psychological contexts within which it takes place (Bloome, 1987).

If literacy is viewed as a shared set of ways of interacting with and interpreting text, then it is appropriate to explore how people gain access to the literacy community and how communities limit access. Literacy observed in the individual is thus a cumulative product of social forces that shape learning and development (Paris and Wixson, 1987, p. 45). The acquisition of literacy is influenced by personal access to situations that enable people to practice and develop literacy. The quest for literacy, the need for literacy and the role of literacy follow almost the same controversial lines moving from smooth, gradual evolution to radical change and transformation.

Learning serves practical purposes but not the same purposes for all people. The context of learning, its antecedents and consequences have to be considered if we want to achieve a better understanding of individuals' responses to literacy instruction and how literacy affects social and cognitive development. In order to assess the role of literacy as a stimulus for development,

> . . . we need to focus on the social value of the goals and the personal significance of the activities as well as the utility and economy of becoming literate. The 'costs' in terms of effort, instruction, and self-esteem are measured against potential gains and losses to individuals in their social groups (Paris and Wixson, 1987, p. 46).

Arguments and counter-arguments

What can literacy contribute to development? This question has been a matter of dispute. Some argue that it can, at best, only alleviate the symptoms of poverty without tackling the true political and economic causes. Others contend that literacy creates motivation and awareness, and results in the acquisition of the skills necessary for development (Dave, Ouane and Sutton, 1989; Duke, 1985; Bhola, 1984).

That literacy is an essential ingredient of individual and social development is commonly accepted:

Two sets of claims have been made on behalf of literacy:

(1) At the *individual level*, the claim is made that literacy changes the way individuals think and feel about themselves and the world around them; and

(2) At the *societal level*, literacy is claimed to promote capacities, predispositions and conditions for a social transformation, including modernization and democratization (Bhola, 1984, *A policy . . .*, p. 250).

During the golden age of education, literacy moved from so-called 'traditional literacy' – literacy as an end *per se* – to a 'modern' notion of literacy based on functionality which is allied with technical progress and economic development. Some authors believe that literacy contributes to economic development. They provided evidence that it does in several ways, as follows:

> (a) by raising the productivity of the new literates;
> (b) by raising the productivity of individuals working with literates, the so-called spillover benefit of literacy;
> (c) by expanding the flow of general knowledge to individuals (e.g. instructions about health care and nutrition), thus reducing the cost of transmitting useful information;
> (d) by acting as a device for selecting the more able individuals and thereby enhancing their occupational mobility; and
> (e) by strengthening economic incentives: that is, the tendency for people to respond positively to a rise in the rate of reward for their efforts (Torres, 1988, p. 381).

The remark has been frequently made that the world map of illiteracy and poverty are congruent. Therefore, a positive view of literacy as an agent for economic development and the contingent attitude to literacy as a brake is echoed in numerous statements from the 1960s and 1970s, and is a recurrent theme in Unesco documents. At the Tehran Conference in 1965, it was said that, since illiteracy is an integral part of underdevelopment, literacy must become an integral part of development, and this opinion was mirrored in the Unesco-UNDP Experimental World Literacy Programme (EWLP), based on a functional, work-oriented literacy approach (Hamadache and Martin, 1986; Sjöström and Sjöström, 1983; van't Rood, 1988; Bhola, 1984; Unesco, 1983).

The expectations arising from literacy were many:

> Literacy would act as the bridge between fatalistic passivity and uncomprehending acceptance, which has been thought of as characterizing many rural peoples, and real participation both in promoting and in determining the nature of the social transformation thought to be necessary. It would act in this way by facilitating a flow of vital ideals and information to the masses, increasing their awareness of the situation in which they live, and of the possibilities and choices before them. It would motivate them to increase their efforts to break out of the poverty cycle, to adopt more advantageous modes of production and distribution, stimulating the desire for skill training, without which such training had been shown to be largely ineffective; it would enable them to participate in civic affairs, both local and national, and reduce those kinds of injustice which stem from ignorance; it would make it possible for them to learn rapidly and cheaply ways of improving the quality of their domestic lives (Thompson, 1981, p. 224).

Although a critical appraisal of the EWLP has yielded somewhat inconclusive results, it is well known that the question of literacy training is an economic problem: there are specific unit costs involved in literacy attainment and there are equally specific individual benefits, in terms of higher productivity and greater earning capacity associated with such attainment.

> What is less often recognized, however, is that the benefits of literacy training are quite as often political as they are economic. This is true in two quite distinct yet complementary ways. First, literacy must be considered a basic right precisely because it is a virtual prerequisite to political participation in social life . . . Second, the social rewards that induce individuals to acquire

> literacy and once acquired, to maintain and improve their level of literacy, are quite as often political as economic (Gintis, 1984, p. 15).

The prevailing literacy optimism of the 1960s and early 1970s has been gradually replaced by a more critical attitude to literacy. The role played by structural factors and the relevance of literacy content have occupied a large place in the debate. The arguments against are encapsulated by Duke, who summarizes the challenging position of Hinzen et al. (1984):

> . . . no proof: that literacy was historically a prerequisite of economic and social development; that literacy efforts have of themselves diminished exploitation and poverty; that literacy is a prerequisite for the intelligent understanding and handling of life; or that it necessarily and directly relates to attaining participative structures, achieving liberation and abolishing oppression (Duke, 1985, p. 7).

The concept of development was enlarged to include first socio-economic, and later socio-political dimensions; the objectives were formulated not merely in terms of economic growth and modernization, but also in terms of cultural emancipation, socio-political and economic liberation. The focus of training shifted from from supplying skills and knowledge for vocational education to creating insight for political awareness and the acquisition of skills for critical thinking.

The premises for this movement from narrow economic goals to humanistic and cultural objectives leading to empowerment of individuals and their local communities were laid down in the Persepolis Declaration (1975), and have been nourished by the reflections of eminent thinkers such as Paulo Freire, Roger Garaudy and Samir Amin.

> The International Symposium for Literacy . . . considered literacy to be not just the process of learning the skills of reading, writing and arithmetic, but a contribution to the liberation of man and to his full development. Thus conceived, literacy creates the conditions for the acquisition of a critical consciousness of the contradictions of society in which man lives and of its aims; . . . Literacy work, like education in general, is a political act. It is not neutral, for the act of revealing social reality in order to transform it, or of concealing it in order to preserve it, is political (Hamadache and Martin, 1986, p. 128-129).

Considering literacy in the total context of daily life, Freire points out that merely transferring content from a knowledgeable and authoritative source to a passive receiver does nothing to promote the receiver's growth as a person unless the latter is critically conscious and autonomously capable of contributing to and influencing his society. The 'culture of silence' needs to be opened up. This calls for a process of awareness – raising thorough emancipatory pedagogy which focuses on empowerment – the process of helping learners and facilitators to acquire modes of critical analysis which will provide them with both the ability to reflect and the motivation to transform, rather than merely serve, the dominant social order (Freire, 1984; Freire, 1985; Freire and Macedo, 1987; Freire and Shor, 1987).

> Freire and Macedo understand that, as a form of political empowerment, critical literacy represents both a theory of pedagogy and a pedagogy of theory. It constitutes a theory of pedagogy in that students are taught to analyse critically how culture functions within asymmetrical relations of power to give certain groups an advantage over others on the basis of race, class, and gender. It serves as a pedagogy of theory because it recognizes that only when theory

> transforms itself into praxis and engages in a project of possibility does it truly enter the world of emancipatory teaching. That is, only when theory becomes transformed into a political act can it realize its socially transformative potential (McLaren, 1988, p. 232).

Going beyond Freire's consciousness-raising concept, popular education which has emerged in Latin America as an alternative approach, seeks to strengthen local organization in order to facilitate social and political action by community groups aimed at producing changes in the distribution of power. Community participation, participatory action-research and the systematization of the group's educational experience are major concerns within this approach (La Belle, 1986; Dave, Ouane and Sutton, 1989).

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III. DEFINITIONS AND CONCEPTUAL APPROACHES TO LITERACY

Pre-literacy, literacy, fundamental education, community development, functional literacy, dysfunctional literacy, basic education, minimum learning needs, non-formal education, universal primary education, popular education, post-literacy and continuing education, traditional literacy, cultural literacy, visual literacy, critical literacy, computer literacy – these are some of the terms used at different times in different contexts by different agencies or persons to determine concepts and in attempts to put forward definitions associated with varying ideologies in literacy research, policy making and practice.

Dreams and disillusions in the global democratization of education and the sharing of knowledge and resources have contributed to alternating waves of upsurge and fading in global concepts about the spread of literacy. A literacy mystique arose over the possibility of creating equality among the world's population in the period after the Second World War.

Failure in implementation, relapse into the *status quo* and shifts in the understanding of development policy and the 'mode of production' (Youngman, 1985) have guided either changes or relabelling of definitions and concepts, and the evolution from global to situation-oriented concepts (for Unesco's conceptual shifts, compare Jones, 1988, p. 251).

Consequently, there is no clear borderline between concepts and no globally accepted definition of literacy. A definition of literacy and/or functional literacy acceptable to all countries neither exists nor is desirable (whatever inconvenience this may cause for the purposes of international comparison, since literacy is a complex, interdisciplinary and relativistic skill, open-ended in terms of an individual's lifetime and aspirations, as well as in terms of possible adaptations to changing times and environments. It should take into account as many factors as possible directly concerning the interests of the people who matter. Short-term approaches based on utilitarian considerations are adopted mostly by governments, other State authorities and employers, while long-term, broader objectives form the basis of approaches advocated by humanist scholars and certain voluntary bodies.

Many concise descriptions of the historical evolution of literacy concepts and definitions, highlighting Unesco's role in the changing interpretation of phenomena, such as *functionality* (from undefined (Gray) via work-related (Teheran conference) to more broadly perceived (Persepolis conference)), *development* and the relative nature of literacy, can be found in the literature (see for example Bhola, 1984; Easton, 1989; Graff, 1987; Hamadache and Martin, 1986; Jones, 1988, Levine, 1986). Some authors try to disentangle the conceptual confusion by first introducing 'literacies' instead of literacy, and then deriving from those the common essence to establish a synthetic working definition of literacy. Levine, for example, suggests that we should:

> . . . discard an albatross of an idea – that literacy is a single, unified competence – and to begin to think wherever possible in terms of a multiplicity or hierarchy of literacies. However, a shorthand for the whole collection will still occasionally be needed and no great harm should follow from a general definition of literacy as the exercised capacity to acquire and exchange information via the written word. Functional literacy can be defined as the possession of, or access to, the competence and information required to accomplish transactions entailing reading and writing which an individual wishes – or is compelled – to engage (Levine, 1986, p. 43).

Easton (1989), after analysing various 'literacies', in accordance with Tuman (1987; 1988 as quoted in Easton, 1989) concludes that the underlying characteristic is not 'dexterity with paper and pencil' but the symbolic manipulation of the environment to build alternative images of reality. This purpose may be served by written as well as by oral, theatrical and pictorial modes of transaction. Furthermore, the Club of Rome, indicating the limitations of the maintenance definition of literacy as opposed to the multidimensional character of innovative learning, recognizes the oral foundation of 'literacies' as one of the most important basic components to be considered in all definitions:

> There are contradictions inherent in the maintenance definition of literacy. There are, for example, many people still living within oral traditions, 'illiterates' who have memorized religious or ethical epics or texts and who can philosophize and act at high levels of morality. Any implication that this type of person can a priori be considered less able, less prepared, or less worthy than the one who can read and yet display intolerance or racism is an anachronism whose time for change has come. There is a pressing need to instill a respect and tolerance for people of other creeds, members of other tribes or clans, and those of a different color, race, sex or religious belief (Botkin, Elmandjra, Malitya, 1979, p. 75, 77).

The following definition, suggested by Unesco for statistical and international comparison purposes, is the one which is quoted nowadays most often in the literature although without reference to its original quantitative normative purpose:

> A person is *literate* who can with understanding both read and write a short simple statement on his everyday life.
>
> A person is *illiterate* who cannot with understanding both read and write a short simple statement on his everyday life.
>
> A person is *functionally literate* who can engage in all those activities in which literacy is required for effective functioning of his group and community and also for enabling him to continue to use reading, writing and calculation for his own and the community's development.
>
> A person is *functionally illiterate* who cannot engage in all those activities in which literacy is required for effective functioning of his group and community and also for enabling him to continue to use reading, writing and calculation for his own and the community's development (Unesco. General Conference, 20th Session, Paris, 1978, p. 4, in Unesco's standard-setting instruments, 1986).

The numerous definitions formulated by governments or NGOs, or proposed by ideological theorists for specific national or programme use – no matter how they are labelled – can be located with this frame. They vary from the pragmatic to the idealistic, depending on the extent to which they interpret, combine, stress and encompass interconnected notions and conceptual aspects. For the purposes of this discussion, we have grouped them under the headings of: (a) the core elements; (b) the contextual dimensions; (c) the predominant forces determining the operational objectives; and (d) the standards.

The core elements

At the core of literacy and/or functional literacy definitions are reading and writing (and – less explicitly mentioned – numeracy), ranging from purely mechanistic to multilayered linguistic, psychological, sociological and epistemological skills. Different schools of thinking see reading either as an instrumental decoding process or as a process not divorceable from the content, including comprehension, reasoning, problem-solving, information and communication, up to knowledge application and transfer or even knowledge creation. Writing, too, is regarded as either a mechanistic, a utilitarian or a creative identity forming skill.

Some exemplary definitions may illustrate the possible spectrum of core elements arising from traditional literacy with a narrow focus on reading and writing as an end in itself. For example, Gudschinsky considers a person literate as one who:

> . . . can read and understand everything he would have understood if it had been spoken to him; and can write, so that it can be read, anything he can say (in Bown, Okedara, 1981, p. 171);

via definitions adding the numeracy component, such as the Pakistan Literacy and Mass Education Commission definition of 1984:

> A literate is a person who can:
> (i) Read and write a simple statement in the national or any of the regional languages;
> (ii) Count and write numbers and do simple calculations (Khawaja, 1988, p. 35)

and computer literacy encompassing the application of technological and epistemological skills as discussed by Wagner, 1987, p. 5:

> The advent and increasing use of microcomputers has led many educators and policy-makers to consider the need for individual competencies in dealing with computer languages and manipulation of microcomputer software, commonly grouped under the term computer literacy. But is this literacy, or is it some combination of languages, scripts, technology and knowledge which might only overlap marginally with the term literacy?

to openendedness.

The contextual dimensions

Definitions differ in relating these core elements to one or several contextual dimensions. They emphasize historical, social, economic, psychological, cultural, ethical, aesthetic or epistemological heritages and perspectives depending on the demands and needs of a country, area, community, group of people or individual. One of the early important representatives of this relativistic contextual view is Gray, who stated in 1956 (p. 24) that:

> a person is functionally literate when he has acquired the knowledge and skills in reading and

> writing which enable him to engage effectively in all those activities in which literacy is normally assumed in his culture or group.

A classic example given by Pattison vividly illustrates the historical dimension:

> To say that Homer was illiterate is something like saying that ancient Sparta had no economy because it wasn't capitalistic. It would be more useful to say that Homer exemplifies the literacy that flourished in the Greek world of the archaic period, but that he did not know how to read or write (Pattison, 1982, p. 7).

Gandhi's concept of basic education highlights economic, psychological and ethical factors:

> Literacy is not the end of education nor even the beginning. It is only one of the means whereby man and woman can be educated . . . I would therefore begin the child's education by teaching it a useful handicraft and enabling it to produce from the moment it begins its training . . . I hold that the highest development of the mind and the soul is possible under such a system of education (Gandhi in Sinclair, 1976, p. 2).

The Club of Rome emphasizes the necessity of an ethical dimension in literacy suggesting that in:

> . . . innovative learning, the stress is on the value or ethical dimension of literacy, not unlike those concepts of literacy that focus on raising consciousness and increasing the capacity to participate effectively and productively in society. The illiteracy at issue here concerns those people in the developed and developing countries alike who are evidently incapable of comprehending simple ethics . . . a minimum requirement for the ethical dimension in literacy would be to treat all fellow human beings with respect and without discrimination (Botkin, Elmandjra, Malitza, 1979, p. 75, 77).

The definition underlying a Sri Lankan programme for women prisoners is among the broadest ones to be found in the literature, encompassing all contextual dimensions given above:

> Far from being limited to reading, writing and arithmetic, literacy should educate the probationers to raise their standard of living. They must be made to realize their religious, civic and moral rights and duties, both individual and collective in order to improve life in society and to integrate in society. The main characteristics of literacy . . . are as follows: reading, writing (minimum theoretical and practical knowledge), elements of arithmetic for current use, health education, harmonization of the constructive, ethical and material elements of the home and the community, introduction to healthy forms of recreation and the use of leisure time, awakening interest in the preservation and efficient use of natural resources, improvement of cultural techniques and of the many aspects of human relations on individual and community levels (Sri Lanka. Ministry of Education, 1988, p. 119).

The predominant forces determining the operational objectives

The contextual dimensions and the content orientation on which definitions focus mainly reveal the attitudes of predominant forces within societies towards, for example, the determination of needs, the distribution of knowledge, norms and conventions, stability (or change) of state, and economic growth and development, which do not necessarily coincide with the aspirations of the people concerned and may even come into conflict with the intentions and aspirations of the 'silent culture' directed towards the active transformation of societies (Freire, 1975; Bataille, 1976).

Consequently, the operational objectives mentioned in the definitions may be associated with different meanings, opinions and ideologies, thus inheriting ambiguity and bias. For example: functionality, participation in civic life, self-realization, income generation, critical thinking, creativity, liberation, domestication.

The definition adopted by China is, for example, work oriented, adjustive and restrictive in respect to a body of knowledge bound to a vocation and/or living area. It does not tackle literacy as a medium for critical cultural awareness, consciousness raising, distribution of information and social action. A circular about provisional measures concerning the standard of literacy education, and the examination system for graduating learners issued in 1953 stipulated that

> . . . learners who know more than 500 words but have not achieved literacy are semi-illiterates; those who do not know a word or know less than 500 words are illiterates . . . As to workers and cadres, only those who know about 3,000 common words, and who can write letters, notices, receipts or official documents of 200-300 words, and who can read popular papers and literature should be regarded as having achieved literacy; a peasant literate must know 1,000 words, basically be able to read the simplest books and newspapers, and be able to write notices, receipts, etc., which are common in rural areas; a literate among city working people must know 1,500 common words, and in reading and writing the requirements for workers and peasant literates in this respect can be consulted. The decisions concerning literacy education of the CPC Central Committee and the State Council, issued in 1956 (and reaffirmed in 1978) demanded that a worker literate knows around 2,000 words, and a peasant literate knows around 1,500 words, both being able to read the easy-to-understand common papers, periodicals, and notices and receipts; they must be able to keep simple accounts and do simple calculation with an abacus (Unesco Regional Office for Education in Asia and the Pacific, 1984, p. 28-29).

The Iraq National Literacy Campaign Law, for example, introduces a cultural standard coherent with the nation's ideology in its definition determining:

> . . . illiterates as individuals (aged 15-45) who don't know how to read and write nor have they reached the cultural standard. By 'cultural standard' it was meant that individuals possess the skills of reading, writing and arithmetic, and to utilize these skills in developing other professions as well as upgrading their life standard culturally, socially and economically in order to practice the rights and obligations of citizenship by participating in the making of decisions and performing public duties. Besides, such a knowledge should be coherent and ever-growing through its integration with the movement of the society and the ideals of the Arab Nation in Unity, Freedom and Socialism (Shawkat, 1979?, p. 22).

The popular education movement in Latin America, drawing from Gramsci's analysis of social change and sociology of knowledge, regards literacy as a means and a part in the people's empowerment process towards transformation at the local level (see also La Belle, 1986; Dam, Ooijens and Peter, 1988):

> Popular education is part of a broader process of transformation of social structures in favour of the oppressed. This process takes place within a complex of activities carried out by the people during the course of their everyday life in order to survive and meet their needs. The task of popular education is to contribute to the development of people's consciousness concerning the

> real causes of the problems that they encounter, in order to increase their capacity to mobilize themselves by participating in organizations and supporting them.
>
> The process of acquiring knowledge about reality goes from the everyday reality to certain forms of abstraction to validate (or refute) the new knowledge in action. Popular education seems to emphasize what Piaget said about there being no mental category which does not have its origins in some concrete practice. This is why it insists on its permanent character of action-reflection-action (Vio Grossi, 1984, p. 307, 308).

Also Freire's concern with literacy is predominantly geared towards social and political action, considering decodification of the word as a starting point for awareness raising, and decoding and changing the world:

> The cognitive dimensions of the literacy process must include the relationships of men with their world. These relationships are the source of the dialectic between the products men achieve in transforming the world and the conditioning which these products in turn exercise on men . . . In the culture of silence the masses are 'mute', that is, they are prohibited from creatively taking part in the transformations of their society and therefore prohibited from being. Even if they can occasionally read and write because they were 'taught' in humanitarian – but not humanist – literacy campaigns, they are nevertheless alienated from the power responsible for their silence.
>
> Illiterates know they are concrete men. They know that they do things. What they do not know in the culture of silence – in which they are ambiguous, dual beings – is that men's actions as such are transforming, creative, and re-creative. Overcome by the myths of this culture, including the myth of their own 'natural inferiority', they do not know that their action upon the world is also transforming. Prevented from having a 'structural perception' of the facts involving them, they do not know that they cannot 'have a voice', i.e. that they cannot exercise the right to participate consciously in the socio-historical transformation of their society, because their work does not belong to them (1970, p. 212, 213).

Reflecting on this idealistic humanist understanding of literacy and its possible implementation, the Club of Rome concludes that:

> . . . the impetus to create especially the type of literacy that could spark social participation and change is lacking in all but a few cases. Many of those in power are afraid to face the changes, and the rise in expectations, which would result from expanded literacy. This lack of political will is an illustration of how the refusal to use available power can lead to waste in learning (Botkin, Elmandjra, Malitza, 1979, p. 75).

The standards

The standards implied in the different definitions can be located on a continuum of capacities advancing in a spiral manner – from reading and writing one's name, a brief message (Gray, 1956, p. 20), to achieving a particular reading age or completing a particular number of school grades (e.g. Kuwait legal definition, see Al-Sharah, Khabbas in Dave, et al, 1987, p. 152), and coping with daily life situations including those pertaining to the workplace (e.g. the United Republic of Tanzania, see Mpogolo in Dave, et al, 1985, p. 139), to comprehension, application, analysis, synthesis, evaluation and even creation of highly specialized or complex thoughts and ideas surpassing by far the domain of general education, perennially growing with the evolution of knowledge (e.g. Freire, 1970; Freire, Macedo, 1987; MacLaren, 1988). The basic skills and the competence-based approaches both measure the ability to apply certain identified skills that literate adults are supposed to possess, such as filling in bank loan forms, and also, increasingly, income generating skills.

Gillette and Ryan, demonstrating the constantly rising degree of literacy required, pose the following questions:

> Can you fill out your income tax return without having to re-read (and possibly re-re-read) whole sections of the instructions? Do you understand the central features of your country's economic policies, and of their interrelations with – and effects on – the economies of other regions of the world? Do you grasp the values (and dangers) of the ingredients of food and medicine stipulated on their containers? Are you able to operate portable video equipment? Can you decipher the insurance provisions spelled out on the counterfoil of an air ticket? And – the clincher – do you have the skills required to retrieve unaided from a computer simple information of use in your everyday professional and personal life?
>
> Assume you live in virtually any urban centre in the world today and work, say, as a secondary school-teacher. If you answer 'no' to more than two of these six questions, can you be considered effectively literate? (1983, p. 25-26).

As literacy standards implied in definitions have changed over times within countries (for Myanmar, for example, see Unesco Regional Office for Education in Asia and the Pacific, . . . case studies: Burma, 1984, p. 5-7), they will continue shifting in complexity and ideology within countries and from country to country.

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IV. LEARNERS, POTENTIAL LEARNERS AND DROP-OUTS

How many persons – men, women, young people and children – are illiterate? Where and how do they live? Why are they illiterate? What does their illiteracy mean to them and others? Why do some of them participate in literacy activities while others do not or drop out? How do they experience the learning situation? What expectations do they have of the acquisition of literacy skills on their personal dreams, their place in society, their perception of society and their society's perception of them, their political and social action, their productive life? The answers deducible from the literature are scarce and scattered, mostly vague and sometimes even contradictory. The changing perception of the learner as a passive entity – an 'empty vessel' – to a person with knowledge and experience (not necessarily of the 3Rs) actively participating not only in the programme at all levels but also having the potential of transforming society and re-creating culture was brought about by an evolution in the concept of literacy.

With the shift from traditional to functional and community centred literacy, and in particular after publication of the Unesco report *Learning to be* (1972) and Freire's speech at the Persepolis conference in 1975, learner orientation and participation have gained momentum over the former emphasis in literacy organization on teachers and teaching (International Council for Adult Education, 1979, p. 33). This change is visible, however, more in the increase of verbal statements, assumptions and theoretical discourse on learners profiles than in hard data derived from action.

> During recent years, designs for literacy programmes reveal a new view of learners: as active and experiencing subjects rather than as passive objects. Learners can no longer be considered as statistical units, illiterates with blank minds waiting for enlightenment, but as working adults already committed to ways of looking at the world and of carrying out productive activities. (Callaway, 1976, p. 184)

Views and experiences featuring learners, potential learners and drop-outs may be grouped around the following themes: (1) the quantitative dimension; (2) the qualitative dimension: (2.1) selection, (2.2) motives, (2.3) learner characteristics, (2.4) drop-outs.

1. *The quantitative dimension*

By far the most elaborated aspect shaping (or not) the learners profile is of a statistical nature. Censuses, campaigns, programmes and projects have produced a variety of statistical outputs reflecting, depending on their origins, a group's, a community's, a country's or the world's literacy situation in different ways. Collection and interpretation of data are influenced by a variety of operational objectives and underlying definitions, often relying on individual replies and not on literacy tests, sometimes projecting results gained by observing or interviewing a small sample (e.g. from the army, marriage registration offices, etc.), not rarely through the activities of enumerators who are not aware of the purpose to which their information will be put (Unesco, 1957; Gillette and Ryan, 1983), and also by exposure to political manipulation (Jules, 1988).

Comparison of literacy data among countries is a slippery task, which makes the drawing of a clear-cut world illiteracy map impossible, and identifying an individual learner's needs in his/her societal context difficult. To improve the coverage and comparability of national literacy statistics, Unesco suggested in 1978 the use of a standardized definitionary frame for data collection (Unesco, 1981, p. 4; see also chapter 3). However, the definitions used for censuses and surveys remain diverse.

Through deriving and compiling national census literacy data for publication – however fragile in terms of reliability and comparability – Unesco has taken a lead in disseminating the quantitative dimension: statistics, estimates, projections of illiteracy on an international scale (Unesco, e.g. *Estimates . . .*, 1978; *Towards a methodology*, 1978; 1979; 1980; 1983; 1985; *Compendium . . .*, 1988; *Statistical yearbook*, 1989).

Recent estimates published by Unesco highlight the world's literacy situation as follows:

1. In 1985 there were an estimated 3,203 million persons aged 15 years and over in the world: 2,314 million literates, and 889 million illiterates. The 889 million illiterate persons represented more than a quarter of the world's adult population (27.7%). About one in five of all adult males is illiterate and more than one in three of all adult females. All but 20 million of these illiterates were to be found in the developing countries.
2. When analysed by continent, Asia with 666 million illiterates accounted for 75% of the world's total, Africa with 162 million accounted for a further 18%, and Latin America and the Caribbean with 44 million accounted for another 5%. Illiteracy rates vary considerably by continent: the highest rates in 1985 are for Africa (54%), followed by Asia (36%) and Latin America and the Caribbean (17%).
3. Nine countries had more than ten million illiterates in 1985. These nine countries accounted for three-quarters of the number of illiterates in the world in 1985, and India and China by themselves accounted for well over half (Unesco, *Compendium . . .*, 1988, p. 4).

These figures have certainly to be interpreted with caution. While some countries report persons who can read but not write (semi-illiterates, Unesco, 1957), others only consider as literate those persons who can both read and write with understanding. Functional illiterates, who are not included, would increase the figures tremendously. Some variation occurs regarding the age span since most countries take the 15+ population as the basis for their statistics, while a few base their information on the 6+, 10+, 14+ or 18+ population. The chronological basis of data also varies; some date back to 1970, others are as recent as 1985. Countries that are not Unesco Member States or do not explore literacy skills through their censuses are not reflected. Remote or migrating population groups may not have been reached at all.

Whatever uneven and fragmentary conglomeration global statistics expose, the following conclusions may be drawn:

1. While the proportion of illiterates in the world is declining, the absolute number is rising.
2. Geographical and sex disparities are congruent with poverty and marginalization. The Club of Rome, coining the term 'Fifth World', observes that illiterate populations often coincide with those who '. . . cannot satisfy their most basic needs for food, health, shelter, and employment. Nor is it simply coincidental that these populations tend to be composed primarily of rural people, and that the majority are women (Botkin, Elmandjra, Malitza, 1979, p. 91).

Jules, pointing to the need for urgent action, supports this view and refers to:

> . . . the disturbing reality that, not only is this phenomenon on the increase, but that its geographical configuration coincides with the geography of poverty, disease, hunger and the other symptoms of underdevelopment (Jules, 1988, p. 369).

3. Illiterates are the product of not a purely developmental but a structural and political phenomenon.

Coombs (1985, p. 226-229) suggests cultural/traditional propositions concerning geographic, socio-economic and mainly sex disparities that apply to most countries: the lowest female ratios are found in countries with low participation rates for girls and boys (as, for example, in Africa), where deep-rooted religious and other cultural factors resist equality of education for males and females (as in many Islamic countries). In poverty-stricken rural areas of Asia, in particular, preference for boys over girls education remains strong. Conversely, where educational enrolment increased rapidly, the percentage of women has increased more than proportionately (as in many countries of Latin America and the Caribbean). Another factor accelerating female enrolments is rapid urbanization accompanied by fast breakdown of cultural barriers.

Adiseshiah points to the political background of structural economic disparities and links illiteracy to the sub-human conditions under which the majority live:

> Illiteracy is . . . part of the total sub-human condition of the majority of our people. But this poverty condition of the majority is not simply an absolute conscience-rousing fact. It is in contrast to the increasing wealth and well-being of the minority classes in each country (Adiseshiah, 1976, p. 84).

Jules links this structural phenomenon with inequalities found particularly in the formal school system and to the political implications of such inequalities marginalizing millions of 'silent witnesses':

> To assert the political nature of the literacy act is simply to recognize the organic relationship between the educational result of that act and the tremendous socio-cultural and political implications of those results, particularly when this action unlocks the secret of the word to hitherto unlettered millions who, by this condition, were marginalized and silent witnesses to the drama of history and national development (Jules, 1988, p. 370).

Consequently, literacy work is a political act that may lead to conscientization and transformation as advocated in the Persepolis Declaration (1975), relying on the participation of and dialogue with illiterates (Lê Thành Khôi, 1976; Freire, e.g. 1970;

Freire and Macedo, 1987). To achieve this political act, deeper than quantitative information on participants and non-participants in literacy activities is needed.

2. *The qualitative dimension*

2.1 *Selection.* Some attempts have been made to classify potential literacy learners according to, for example, their age, interests, sex and level of literacy competence. Furter (*Some problems* . . ., 1973, p. 6), for example, elaborates a continuum of conditions leading to different 'customer' groups. Based on the assumption that the concept of an illiterate, without giving any information about a person's socio-economic context, implies nothing but that:

> . . . an illiterate is an individual belonging to a group differentiated from the rest of literate society (Furter, *Some problems* . . ., 1973, p. 6).

Furter elaborates a continuum of eight distinct conditions (from persons in non-writing societies, via semi- and functional illiterates to neo-literates in their respective contexts) leading to eight fundamentally different customer groups necessitating a greater diversification of programmes than is usually practised. He suggested an interdisciplinary team for the study, analysis and assessment of the clientele. Philosophers should take care of the ideological dimension, i.e. the religious, humanistic and cosmogonic beliefs and traditions; psychologists should advise on adult learning theories and stages of mental development; educationists should take account of the needs, aspirations and desires of different customer groups; and, finally, sociologists should locate a precise customer group and verify whether such a group is sufficiently homogenous (Furter, *Some problems* . . ., 1973, p. 6-10). Callaway (1976) places this task with the anthropologist.

The question is: what makes a group homogenous? Is it the degree of acquired literacy skills, cultural or vocational background, age, gender or some common need independent of all these factors? De Clerck (1976), for example, relying on experiences from Sudan, Thailand and Tunisia, advocates the need to direct literacy activities at both the illiterate individuals learning at a literacy centre and at the community as a whole to prevent social disintegration in a collective:

> . . . literacy training – whether functional or not – is not simply a matter of individuals who are learning to read, write or do written arithmetic; it is a matter which affects the social milieu in the full sense of the term – the knowledge, skills and patterns of behaviour of the social group as a whole. If the milieu is pre-literate, literacy training is in great danger of falling on stony ground and being cancelled out by the behaviour patterns of the majority of the members of the social group, and the new literates will quite likely soon relapse into illiteracy (de Clerck, 1976, p. 38).

Fordham also warns of assuming that categorizing people as a target group necessarily gives them homogeneity. Classification done by planners may create a 'reality' which is imaginary and may lead to the development of activities for a non-existent group. In favouring the programme-centred selection, he stresses the necessity of meeting the needs of the various groups of individuals consisting of both illiterates and neo-literates.

> It is possible to classify target groups within the broad range of adult illiterates and new literates in a number of ways. For example, by age, by occupational background and interest, by geographical location (e.g. rural, urban, tribal, nomadic) or by special groups (e.g. women, the disabled, long-term prisoners). However, there are problems in making such classifications as programmes that are developed for one group may also have relevance to other groups. For example, a literacy programme may attract both older and younger members in a community; it may also attract men and women and be of interest to a variety of occupational groups. Classification is sometimes of more concern to the planner . . . In view of this, it is better to think of categories of programme rather than categories of target group . . . Target groups should thus be seen as examples of users rather than as focal points of planning (Fordham, *Developmental* . . ., 1980, p. 50-51).

The following examples indicate that it may be advantageous to have mixed groups:

> One of the outcomes attendant to the class meetings was the opportunity for the villagers to socialize. Because children attended evening sessions with adults, these class meetings developed into social occasions for entire families (Amatykul and Jones, 1988, p. 392).

Ramdas (1985, p. 103) desires that programmes geared to women should also have the effect of attracting men. This would help this target group to escape from its isolation and make women's problems a concern shared by men.

The statistical learner profile derived from the Experimental World Literacy Programme (Unesco; UNDP, 1976, p. 162) demonstrates some homogeneity in terms of age and productive determination: the age span of participants in most programmes was 15-34, the most economically productive group of the population. The survey *Literacy in Asia* (Regional Experts Meeting, 1978, p. 21) detects a significant problem with selective programmes:

> The experience of selective programmes reveals one basic shortcoming. The target group does not exist in isolation; it lives and interacts with all the other elements in the population. Literacy programmes limited to one or two sections cannot take root in a social ecology characterized by illiteracy and ignorance. Thus, the price of selectivity is the negative interactions which are likely to occur.

2.2 *Motives*. Ahmed states in 1975 (p. 1) that (at that time), out of an estimate of over 800 million illiterates in the world, only about 40 million were reached through some form of literacy activities. Is this due to a lack of adequate provision or to lack of interest on the part of the illiterates? The literature contains much documentation supporting the latter, pointing out reasons for non-participation such as disinterest, fatigue, fatalism (in particular with oppressed peasants and women, see International Council for Adult Education, 1979, p. 34), and attitudes emerging from interaction between literates and illiterates. Here:

> Adults as a rule are not interested in literacy classes. They have their own full load of work. Moreover, they see no advantage in attending such classes. They equate reading and writing with employment in government or mercantile services, and the illiterate adults in rural and peri-urban communities have no scope for such employment and have no ambitions in that direction. They usually complain of hard work, lack of spare time, and disinclination to attend such classes (Chickermane, 1983, p. 2).

Traditional values, such as those articulated here by Iranian peasants and by a 23-year-old Ethiopian illiterate man, contribute to culturally rooted resistance against literacy:

> These cultural characteristics explain why even today illiterates are not bothered about their illiteracy if an intermediary is available (the scribe, the public letter-writer in the village, etc.). Hence the reactions of the peasants in northern Iran who asked to be paid for learning to read and write. They were not conscious of illiteracy as being their problem; it was somebody else's (Furter, *Possibilities and limitations . . .*, 1973, p. 9)

> When a girl is educated it becomes a problem to find her a husband. If the man is illiterate there would be a social inequality between them and he would not like that (Sjöström and Sjöström, 1983, p. 156).

Bergsma and Chu (1989, p. 44), in a discourse about women in Pakistan, extend this view indicating what far-reaching consequences women may sense:

> As women face the demands of change which accompany education and religious norms through which they interpret reality, then these women become immigrants in a new world. Few are prepared for this sojourn.

And the International Council for Adult Education (as also Fordham, *Participation, learning . . ., Some problems . . .*, 1973) concludes:

> Erroneously, planners assume that people with no previous exposure to literacy or written language will instantly see it as a solution to their felt needs (1979, p. 34).

On the other hand, the literature also gives accounts of adults who wish to become literate for a variety of motives. A study from Saudi Arabia, for example, identifies the following key motivators in adult basic education:

- Education for self-improvement (personal);
- Privacy (writing and reading one's own correspondence);
- Religion;
- Safety and daily needs;
- Social status and prestige; and
- Vocation and finances (Hamidi, 1975, in: International Council for Adult Education, 1979, p. 36).

Rural/urban migration or children's school entrance are also highlighted as motivational factors. Some illiterates:

> . . . see advantages mainly in economic terms, in the possibility of keeping records, of checking weights and measures when selling their produce, of reading relevant information, of eventually earning higher incomes. Others are parents whose daughters and sons are attending school, and who have joined literacy classes in an attempt to understand the world of their children and of the future (Callaway, 1976, p. 184).

Several authors plead for the creation of a positive literacy climate: a pre-literacy phase, which may mobilize indifferent, resistant and unmotivated persons. Such activities could be based on the successful experiences arising from pre-literacy preparation in the United Republic of Tanzania, Botswana and Somalia (Lazarus, 1982; International Council for Adult Education, 1979; Fordham, *Non-formal education . . .*, 1980).

Participation of social groups and individuals at all levels of planning and conducting small-scale as well as large-scale literacy activities is considered to be a key issue for motivation and creating an enduring positive attitude towards learning. The most eminent example quoted is the experience of Mali (Dumont, 1973).

2.3 *Learner characteristics.* Several studies attempt to arrive at learner characteristics through more-or-less formal indicators, such as sex, age, marital status, number of children, mother tongue, religion, occupation, home environment, performance and change in attitudes, by sampling persons who had enrolled in literacy activities (Carron, Mwiria, Righa, *General characteristics* . . ., and *Learners' home* . . ., 1989; Jules, 1990, p. 91; Lal and Mishra, 1982; Anzalone and McLaughlin, 1983).

Few authors investigate psycho-sociological adult learner characteristics, such as life experience, knowledge, problem-solving capacities, old-age memory, manifestation of prejudices, social role, adult development stages, etc., inspired mainly by the Western patterns used by andragogists like Kidd, Knowles or Rogers (Callaway, 1976; Al-Barwani and Kelly, 1985, p. 146; Abiose Cole, 1980; Séminaire-stage des responsables de l'alphabétisation, 1980; Specialized Training Course . . ., 1982; Griffin, 1983).

> The village adult who knows so much about so many things, who knows how to survive in the most adverse conditions, is treated as a person knowing nothing (Bhasin, 1984, p. 41).

2.4 *Dropouts.*

> Then we shall decide whether we should become literate or not. But if we find out that we are being duped again with empty promises, we will stay away from you. We will say, 'For God's sake, leave us alone'. (*Why should we become literate?*, 1987, p. 19).

> . . . It is not surprising that we often hear this frustrated complaint from program designers and operators: 'We have a literacy program keyed to the life situations and problems of the learners; we have lesson contents and methods especially designed for the group, and instructors especially trained; yet the people are not interested; there is lack of support and enthusiasm, a high dropout rate, and a low retention of literacy skills (Ahmed, 1975, p. 7).

Almost 50% (on average) of literacy learners drop out (International Development Research Centre, 1979, p. 38). Astonishingly little research and writing has been devoted to dropouts, considering what insights for improvement of action could be gained from learners' frustrations and barriers. The few investigations done in this field tend to detect some sketchy fusion of more individual than institutional related reasons or rely on a small sample, as for example Al-Barwani's and Kelly's (1985) study on Oman. The IIALM study, for example, provides the following list of motives for dropping out:

> Occupational obligations; family obligations; religious factors; illness and fatigue; economic reasons; attitude to learning; unreasonable expectations; inconducive environment; scheduling; change of residence; distance and transportation; extreme weather conditions; and unsuitable curricula (International Institute for Adult Literacy Methods, 1980).

A study form Thailand reports similar reasons such as lack of relevance to daily life; physical exhaustion; need to take care of their belongings; 'too old' to learn; poor eyesight and insufficient energy; great distances; to be out at night; uncertainty of application of knowledge acquired.

> Inquiry revealed that the principal reason for the villagers' non-participation in FLFLP was that they were unable to perceive a meaningful relationship between the education offered and the improvement of their living conditions (Amatyakul and Jones, 1988, p. 391).

Drop-out among women is often rooted in their perception of traditional roles:

> Existing non-formal education programmes for women concentrate either on nutrition, child care and home economics, or on conventional vocational skills in such areas as tailoring, embroidery and traditional crafts. They make little or no call on modern technology and such expertise as managerial skills or accounting procedures.
>
> Among women themselves there is widespread acceptance of discriminatory attitudes and the biases in existing programmes. Often this is a device that women use to rationalize their lack of options and make a virtue out of necessity. As a result they tend to opt out of non-formal programmes and remain poorly educated (Fordham, *Development* ..., 1980, p. 61; see also Ramdas, 1985).

Freire and Macedo interpret dropout as resistance to an alienating culture and as an act of self-affirmation, converting dropout thus into a manifestation of critical literacy:

> The many people who pass through school and come out illiterate because they resisted and refused to read the dominant word are representative of self-affirmation. This self-affirmation is, from another point of view, a process of literacy in the normal, global sense of the term. That is, the refusal to read the word chosen by the teacher is the realization on the part of the student that he or she is making a decision not to accept what is perceived as violating his or her world (Freire and Macedo, 1987, p. 123).

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V. LITERACY LEARNING, SCHOOLING AND ALTERNATIVES

The role of primary education in literacy

The key role played by the primary (or initial or basic) level of education in the struggle to eradicate adult illiteracy is quite clear. All those children who have not had the opportunity of acquiring a minimum level of literacy and numeracy skills during the early stages of their life enter the adult world as illiterates to swell the ranks of the adult illiterate population. And the number in this category is quite large:

> One out of two children in the developing countries to-day does not enjoy the benefit of a full cycle of primary education . . . If the present trends are allowed to continue, by the year 2000 the number of illiterates aged 15 years and over is estimated to exceed 900 million (UNICEF-Unesco Joint Working Group, 1984, p. 7).
>
> The alarming prospects are that millions of children of primary school age will have no opportunity to attend school and consequently will join the ranks of the adult illiterate population of whom over 60 per cent will be women (ibid, p. 5).

Hence the universalization of primary education (UPE) and the completion of the primary cycle by all the children are deemed to be essential prerequisites for the successful eradication of adult illiteracy.

While failure to achieve UPE leads to an increase in adult illiteracy, the continued existence of adult illiteracy may be considered as one of the main obstacles to achieving UPE. Such a conclusion is based on the observation that illiterate parents lack a sense of commitment and motivation in enrolling their children in school, and in ensuring that they remain there to complete at least the elementary stage. It is believed that a high adult literacy rate of about 70 per cent is the critical threshold for achieving UPE in developing countries. The link between adult illiteracy and failure to achieve UPE, therefore, is such that they thrive on each other, constituting a vicious circle. Hence, the importance of considering adult literacy and primary education as two aspects of the same problem cannot be over-emphasized.

Universalization of primary education (UPE)

Since universal primary education means different things to different people, Hawes (1983) discusses the difficulty in attempting to formulate a generally acceptable single definition of UPE. The various interpretations of the term UPE range from a functional concept adopted by the Unesco meeting of Asian Member States in Karachi in 1959, which refers to the 'first stage seeking to achieve compulsory schooling for at least five years with a view to ensuring permanent functional literacy' (APEID

Regional Meeting on Universalization of Primary Education, 1983, p. 43), to something as wide (but vague) as the definition used by the Commonwealth Secretariat:

> . . . that state of educational practice where, by conscious effort, communities attempt to make opportunities for learning and self-improvement available to all their people (Hawes, 1983, p. 125).

Hawes points out that the various definitions cover a number of alternatives such as: universal attendance; universal capacity; and universal accessibility. He asserts that criteria of universality will vary and are dependent on historical, economic and political factors (ibid, p. 127).

The criteria of universality have both quantitative and qualitative dimensions. It should be noted in this regard that compulsory primary education and UPE in a numerical sense do not guarantee a high rate of literacy because there is evidence that 'some countries with relatively high enrolment ratios are still to be found in the group of illiterate countries' (Fisher, 1982, p. 156). Ahmed refers to the 'naive confidence' that existed in the 1960s regarding UPE:

> The question of the universalization of primary education and the elimination of illiteracy in Africa, Asia and Latin America, of course, had been raised in the 1960's and with naive confidence it was believed that the problem would be solved by the 1980's. By the end of the 1960's, the realization had already dawned that it was not just a numbers game, that the individual and social purpose of education were not automatically served by the linear expansion of the existing system, and that the numerical targets could not be attained globally without rethinking the nature and functions of the educational programmes. Although the tyranny of numbers could not be escaped, the original goal of quantitative expansion was broadened to include the reexamination of the premises regarding the structures, content, process and goals of education (Ahmed, 1982, p. 134).

A deeper analysis of the concept of UPE which, therefore, becomes necessary in the context of literacy and lifelong education suggests that the emphasis should not be limited to the arithmetic of enrolment and the number of years in a given institution, but should be extended to cover the *quality* – the aims, content and level of achievement – deemed adequate to provide the minimum knowledge, skills and attitudes needed by an individual to initiate a lifelong learning process and enhance his or her educability. This was the way 'basic education' had been envisaged, for example, in the Faure Report (Faure, et. al., p. 184) and the Kirpal Committee Report (Meeting of Experts on the Basic Cycle of Study, 1974, p. 4). In order to achieve this aim, it becomes necessary to review the conventional structures of primary education, the content and the delivery systems, and to investigate the possibility of introducing innovative approaches to overcome various obstacles to UPE and deficiencies in the existing system. The problem to be overcome is two-fold: providing access to and effective participation in primary or equivalent education for all school-age children; and literacy and numeracy courses leading to an equivalent to primary education for out-of-school youth seeking a second chance.

Non-formal approaches

In their efforts to eradicate illiteracy, many countries have focused their attention on three important aspects of their educational activities: (a) expansion and strengthening of the formal primary school system; (b) development of adult literacy programmes; and (c) exploration of the potential of the non-formal modalities.

It has been recognized, however, that attempts made so far to fulfil the basic task of achieving the target of UPE and completion of primary education by all through the expansion and strengthening of the formal school system have not brought effective returns in many developing countries. While presenting the United Nations 1978 assessment (*The expanding world of learners: 1950-2000*) of the demographic aspect in the growth of learning needs in the world, Coombs states that:

> As important as formal education is, it must be recognized that a large portion of the burgeoning learning needs in both developing and developed countries lie beyond its reach and competence . . . (Coombs, 1982, p. 146-148).

Attempts to universalize primary education on a full-time basis through the formal system has been described as a 'Sisyphean policy' that is not viable in most developing countries (Kurrien, 1983, p. 181). Much attention has been paid to the problem of developing countries who do not succeed in their efforts to find a place in school for every child of school-going age, nor of keeping them there long enough to acquire permanent literacy, despite the fact that substantially larger financial allocations for the purpose are now available than at any earlier period. This failure is attributed to many reasons, among which the more significant ones are: poverty, social and cultural deprivation, and the rigidity of the formal school – including the irrelevance of its curriculum.

In spite of the fact that considerable budgetary allocations are being made for primary education in the formal system, it is estimated that there are about 188 million school-aged children who are not enrolled in schools in the world. In the case of the enrolled, there still exists the phenomenon of those who drop out early before they have acquired even the minimum literacy skills needed to lead fruitful lives. There is also the problem of the modest level of achievement of those who pass through the system. In this context, suitable measures should be taken to ensure that drop-outs from the formal school need not necessarily be drop-outs from the wider learning system that should exist in all societies.

The existence of sizeable numbers of children who are unable to participate in the formal education system in many countries creates a real and urgent demand to search for non-formal and alternative approaches, structures and pertinent curricula to supplement and complement the formal system in order to provide primary education for all. It may be noted that, in addition to the non-formal alternatives, 'priority actions directed at strengthening *informal* learning opportunities by enriching the rural environment are also suggested' (Coombs, Prosser, Ahmed, 1973, p. 93).

The target group

Non-formal and alternative approaches for education at the primary level are directed mainly towards the following categories of learners:

- unenrolled children;
- school drop-outs;
- special population groups in terms of their particular situation and environment (e.g. girls, disadvantaged groups, nomads);
- adults who have been deprived of primary education.

In a discussion on 'the arithmetic of achieving universal primary education' Frederiksen refers to the effect of high population growth, and high levels of repetition and drop-outs on the struggle to reach UPE (Frederiksen, 1983, p. 141). The problem involved in enrolling the 'ultimate or last 10%' and catering to their needs has received special attention (Williams, 1983, p. 159). School failure is considered to be one of the most serious and widespread problems confronting primary education today. The thirty-ninth session of the International Conference on Education, October 1984, reviewed this problem at an international level (Garcia Garrido, 1986, p. 229). Much attention has been drawn in the literature to social as well as educational factors responsible for drop-outs as well as 'push-outs' (see, for example, Fordham, 1980, p. 41).

Lower participation rates for girls in primary education is seen to be one of the main obstacles in achieving full UPE in many countries (see, for example, Unesco Principal Regional Office for Asia and Pacific, 1987).

> The core of the solution to the problem of universalization of primary education, therefore, lies in taking education to girls in the rural areas (Naik, 1985, p. 3).

Even in countries which have already achieved considerable progress in UPE, there exists a problem with minorities and marginal or disadvantaged groups. The most frequently mentioned groups belong to the following categories (Garcia Garrido, 1986, p. 220):

- rural marginalization;
- socio-economic marginalization
- ethnic and linguistic minorities;
- immigrant workers.

Non-conventional structures, institutions and programmes

Many countries have attempted to set up alternative non-conventional education structures to cater to the educational needs of non-school goers and early school-leavers. These structures were designed to supplement and complement the conventional formal system. They had certain unique features attributed to them; they were flexible and adaptable, able to produce quick results, needs-based, innovative and economical. Different dimensions of such alternative delivery systems provide an insight into the potentialities of these approaches (Unesco Principal Regional Office for Asia and the Pacific, 1989, p. 9-18).

Examples of non-conventional and non-formal approaches to primary level education cover a wide range of structures and practices from large-scale nationally implemented and state-controlled or supported projects to small-scale community projects initiated by volunteers and non-governmental organizations. Countries such as China, India and Indonesia, which have NFE structures within their national education systems, have developed extensive non-formal programmes as alternatives to the formal system (see, for example, APEID Technical Working Group Meeting on Alternative Structures Linking Formal and Nonformal Education with Special Emphasis on Universalization of Education, 1978; and Ranaweera, 1989). Examples of projects for special categories are: girls (Naik, 1986); children of nomads in Algeria (Bensalah, 1987); 'parking boys' of Nairobi (Gichuru, 1984); street boys of Bogota (de Armengol, et al., 1989); the Mobile Tent School of the Philippines for mobile ethnic tribes (Lasam, in Ranaweera, 1989); and the 'Cheli Beti' programme in Nepal for peasant women and their daughters (Chlebowska, 1987). These illustrate the wide range and variety of innovative arrangements that are already in existence.

There are several examples of primary level programmes for children organized as an extension of mass literacy campaigns for adults. The Ethiopian National Literacy Campaign, for example, is targetted to include children from age 8 upwards. Several other countries, such as Bangladesh, Pakistan and Zambia, have also concentrated more on mass literacy programmes as their main alternative strategies to cope with the needs of illiterate children and young adults (Ranaweera, 1989).

A closer examination of the content and learning/teaching methodology of these programmes reveals that many of them are non-conventional only to the extent that their structures are different from those of the conventional formal system. In other words, their content, methods and materials are often not very different from those used in formal primary schools. Since many programmes make use of regular primary school-teachers as part-time teachers, without giving them adequate training in non-formal methodologies, it is inevitable that they adopt methods and use materials that are familiar to them. There are, of course, several examples of programmes where the content and methodology have been suitably adapted to meet the needs of learners in non-formal settings, particularly with the participation of the learners, instructors and members of the local community (see, for example, Naik, 1985). It is clear that those small innovative projects organized at the local (city or village) level, with the maximum participation by the local community at all stages of planning and implementation, have a much greater claim to be genuinely 'alternative' than the larger state-controlled projects.

It is asserted in most of the literature that the success of alternative approaches depends to a great extent on the degree of involvement of the participants and the local community in the determination of their own programmes and in the planning and management process. Another important factor is the degree of collaboration by various governmental and non-governmental agencies, besides the ministries of education (or non-formal education) normally expected to be responsible for these programmes. The extent to which the community could contribute to the success of a project is demonstrated by the 'Village Education Committee' approach adopted in the action-research project on UPE in Pune, India (Naik, 1985, p. 8).

Problems and issues

Proposals for introducing alternative non-conventional approaches to primary level education have always been in danger of being regarded as offering second-rate alternatives to 'real education'. It is inevitable that the debate on UPE has been linked with the debate on universalization of basic education (UBE), since what had been proposed in the 1970s as a temporary 'crash' programme to meet the basic minimum learning needs of children had been transformed into a new concept and a new strategy to meet the challenge of UPE. The recommendation of the Faure Report that:

> Universal basic education, in a variety of forms depending on possibilities and needs, should be the top priority for educational policies in the 1970s (Faure, et al., 1972, p. 192).

had been followed up and linked to UPE by Phillips as follows:

> At present, however, as later chapters will show, it is not feasible to universalize the human right to education except by a shorter cycle which provides for the mass of drop-outs. For at least a decade or two the role of UPE (universal primary education) in bringing the mass of educationally deprived children above the educational poverty line probably has to be assumed by UBE (universal basic education) together with supporting services of a nonformal kind for the purpose of literacy retention and recuperation of drop-outs (Phillips, 1975, p. 8).

In defending the need for the existence of a dual system – one providing a 'sound minimum primary education system of the conventional kind', and another which provides 'a minimum form of functional literacy, similar to that which is given in adult functional literacy programmes' to children outside the formal system – he states:

> The existence of such a dual system may be regarded as discriminatory, but surely it is less discriminatory than the unconscious present discrimination of giving children no education at all? (ibid, p. 158).

Querying whether basic education is a tool of liberation or exploitation, Mbilinyi makes the following critical comment:

> Because of the lack of financial and other resources, basic education is to be low-cost, cheap education for the masses – i.e., its form and content is determined by the material base of underdeveloped society. This also means it will contribute to the reproduction of the same underdeveloped material base, and to the reproduction of the exploited and dominated position of the masses within the society itself (Mbilinyi, 1977, p. 494).

It is clear from the above that any proposals for radical restructuring of primary education are bound to be met with strong criticisms and resistance.

One of the main socio-political barriers to the development of non-formal approaches, particularly in the developing countries, is the power and control exerted by those who want to maintain the traditional formal system and devalue the non-formal structures to the status of inferior substitutes. This raises an important issue regarding the equivalence of the non-formal programmes in relation to the formal system and their acceptability for purposes of employment or re-entry to the formal main-stream. The problem of assessment for accreditation and equivalence becomes critical in this context:

> The key to such acceptability lies in the assessment system. Alternative 'basic systems' have been devalued precisely because they are not seen to be leading anywhere except possibly back to the farm). Once it can be proved that a certain level of publicly certified performance can lead learners on and up in the struggle for individual betterment, which, for good or ill, is part of

> everyone's aspirations, then the mode of getting there will also be accepted (Hawes, 1983, p. 135).

The need to reinforce interaction among different elements of a basic level of education has been stressed (UNICEF-Unesco Joint Working Group, 1984, p. 34):

> Strengthening the mutually supportive relationship between early childhood programmes, primary education, literacy and post-literacy programmes and viewing them from a broad perspective of a basic level of education geared to the community's total learning needs is an essential element of the task to be undertaken.

The quest for effective personnel, adequate physical facilities and financial resources, untapped potentials for both human and material resources, and evaluation of achievement are other issues which are being discussed (Coombs, Prosser, Ahmed, 1973, p. 55-76).

A wide and comprehensive range of general principles and key concepts to guide the process of UPE have been formulated and recommended by the International Conference on Education, 39th session, Geneva, October 1984, *Final report*, p. 28.

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VI. ORGANIZATION FOR ACTION: BROAD APPROACHES, STRUCTURES AND LITERACY PROVIDERS

> If you can teach, teach;
> If you can't teach, learn!
> (Cuban mass literacy campaign. In Bhola, *Campaigning . . .*, 1984, p. 95)

There is no single way to organize literacy provision. Various attempts have been made from different perspectives and with differing objectives. How can action to promote literacy be organized? Military jargon is looked to for the necessary terms such as strategy, approach, struggle, combat, etc. Lind and Johnston define literacy strategies (or approaches) as:

> models of planning and implementation of literacy activities. The strategies adopted arise directly from the objectives of the deliverers of the programmes, as regards both choosing literacy as the means for operation and making the contents and methods fit to the overall aims (Lind and Johnston, 1986, p. 49).

In order to translate these ideational objectives into actions, arrangements, institutions, structures, etc., have to be invented or redesigned from existing ones. A set of roles and a corresponding set of rules and underlying values are to be observed. There is a general agreement that adult education in general, and literacy in particular, has to find forms of action, administrative structures and new institutions which will not imprison it in a new scholastic ghetto, but which will enable it to extend its purview (Furter, 1973, p. 25; Bhola, 1984 and Bhola, *World trends . . .*, 1988).

Broad strategies of literacy provision

Very often, what are termed approaches and strategies could be referred to as the 'philosophy of action' in the sense that they provide the sources of motivation and commitment, criteria for the choice of goals, and principles to guide action. Several programmes have moved from philosophy to ideology in their commitment to a particular form of action (Bhola, *World trends . . .*, 1988, p. 20). According to Gillette and Ryan,

> Fundamental education, 'animation rurale', out-of-school education, functional literacy, selective work-oriented functional literacy, non-formal education, basic needs in education, the dual strategy . . . Since World War II and the subsequent creation of world educational structures and programmes, some dozen successive waves of major international innovation have inundated education and educators (Gillette and Ryan, 1983, p. 30).

A literacy strategy has to respond to a number of questions. A strategy is both an attempt to provide an answer and a product of such questioning. The key issues raised are the following: What are the priority aims? Who are the participants? What is their role in the total process? How is the teaching/learning interaction perceived? What are the implications of all this on the contents, methods, use of languages, supervision, monitoring and evaluation procedures, etc.? Much attention among these questions is paid to the priority aims which are said to condition and determine the strategies for implementation.

Lind and Johnston distinguish three main sets of objectives which inspire the launching of literacy programmes. They characterize two of them as 'positive' or 'active', and one as more 'passive'. These are:

> - activities principally inspired by a wish to make political changes;
> - activities principally inspired by a wish to develop production;
> - activities intended to provide supply to demand, with a more 'fundamental education' content.
>
> As has been noted, it is seldom that these objectives are exclusive, and it is frequent that different interest groups push for, or use, a programme for different objectives (Lind and Johnston, 1986, p. 49).

While defining literacy, its links to the cultural, social and ecological context have been frequently stressed, together with the influence of developmental ideology, educational objectives, cries for educational reforms, prevailing forms of organization, etc. Bhola distinguishes:

> ...a set of five norms that can be brought to bear on the concept and definition of adult education: (a) the norm of comprehensiveness and continuity; (b) the norm of essentiality; (c) the norm of structural freedom or de-institutionalization; (d) the norm of utility; and (e) the norm of serving people's interests (Bhola, *World trends . . .*, 1988, p. 16).

Bhola then discusses world trends under these five categories. For instance, *lifelong education, éducation permanente, continuing education, recurrent education* are said to derive from the need to answer to the norm of comprehensiveness and continuity. The same norms are sought by *community development* and *community education, extra-mural education*, etc., in relation to different constituencies of adult education. In order to meet the norms of essentiality, *fundamental education* and *basic education* were invented. Terms such as *out-of-school education* and, more recently, *non-formal education* seek to promote the norms of structural freedom (Bhola, *World trends . . .*, 1988, p. 16-19).

The major approaches prevailing in the recent history of developing countries are treated throughout the literature by emphasizing trends which are sometimes chronologically defined (fundamental education, basic education, functional literacy, literacy for liberation); landmarks such as the World Adult Education Conferences (Elsinore, Montreal, Tokyo, Paris); and turning points such as the Teheran Conference of Ministers of Education on Literacy marking the proclamation of the famous Experimental World Literacy Programme (EWLP), or the Persepolis Declaration influenced by the ideas of Paulo Freire and marking the consecration of literacy for liberation. This is summarized by Lind and Johnston in their review of objectives and strategies of adult literacy in the Third World:

> In recent history, we can distinguish four approaches, that have had or still have a major influence in the Third World; The 'fundamental education' approach (in today's terminology,

> 'basic education' or 'general literacy'); the 'selective-intensive' functional approach (launched through the EWLP, and to some extent still practised as 'Functional literacy'); the 'conscientization' approach (inspired by Paulo Freire, and often promoted by NGOs); and the 'mass campaign' approach. None of these are complete or exclusive strategies. They focus on different aspects and there certainly exist mixtures and variations of these approaches. All literacy programmes do not necessarily fit into these categories and some can be fitted into one, while they are clearly influenced in certain aspects by others. The growing experience of literacy in the world means that even programmes with rather different aims may borrow successful aspects from each other (Lind and Johnston, 1986, p. 49).

What stems from this statement, and becomes particularly apparent from the following references, is the lack of overall agreement in the use of the words strategy and approach. They are sometimes used interchangeably and sometimes in a hierarchical relationship.

On the basis of the policy aims of the programmes reflecting their developmental philosophies, most authors are using a dichotomic or trichotomic scheme to define the strategic approaches to literacy (Bataille, 1976; Hamadache and Martin, 1986; Sjöström and Sjöström, 1983; Bhola, *Campaigning* . . ., 1984, *World trends* . . ., 1988, *The politics* . . ., 1988; Gillette, 1985; Gillette and Ryan, 1983; Tapia Soko, 1980; Fordham, 1985; Oijens, 1982; Jones, 1988). Opposition is seen between traditional and functional literacy or between functional literacy and literacy for liberation. A second-line division contrasts selective/intensive approaches with mass strategy. A transposition is generally operated between these two broad categories and an equation established between the traditional and mass approach on the one hand, and functional literacy and selectivity on the other. However, it is difficult to discriminate in such a dichotomy between traditional literacy and literacy for conscientization, and several authors have therefore introduced new categories to frame these trends. They have established a distinction between *project, programme* and *campaign* in regard to the mode of operation, the scope of action, its motives, etc. (Gillette, 1985; Bhola, *Campaigning* . . ., 1984).

Sjöström and Sjöström identified two major trends in approaches to literacy which they characterize as *traditional literacy* related only to the ability to read and write, and *modern literacy* related to the principle of functionality and which connotes the practical application of reading and writing. In the international scene, traditional literacy is connected with fundamental education and functional literacy with the EWLP. By essence, traditional literacy which aims at whole populations uses a *mass approach* while functional literacy is *selective or work-oriented* (Sjöström and Sjöström, 1983, p. 22-23). Oijens makes the same dichotomy between traditional literacy isolated from the environment and an approach which is more functional, community-based and hence related to the surroundings.

In its synthesis report on the evaluation of the EWLP, the Secretariat of Unesco insists on the fact that

> *Traditional literacy* training has only one *intrinsic* objective, namely, the teaching of reading and writing, accompanied in most cases by elementary arithmetic. It is thus an isolated, extracurricular operation which is self-justifying and an end in itself . . . As a 'rite of promotion and initiation', conferring on man the abstract power of acceding to knowledge of the mechanisms for deciphering the symbolic code of writing, traditional literacy training is primarily concerned

> with *form*. The *functional literacy* method is seen, by contrast, to be less a new type of literacy work than a training process in which the goals are inferred or borrowed from *extrinsic* objectives . . . Functional literacy training thus gives precedence to *content* . . . needed for a development 'project'. In this process, reading and writing constitute not an end in itself but a means – and a fundamentally important one – to the intellectualization, mental grasp and internalization of technical knowledge, the mastering of the thought/language relationship which can facilitate the transition from thinking in concrete terms, when explanations tend to be sought in magic, to thinking in abstract terms, when the mind is receptive to the scientific interpretation of phenomena (Unesco, 1976, p. 38-39).

Analyzing the development concept based on dependency theory, van't Rood asserts that the Unesco Experimental World Literacy Programme (EWLP) is largely influenced by the French social scientist Maquerez. He goes further in providing a schematic comparison of several aspects of literacy programmes by Maquerez, Unesco (as reflected in the EWLP) and Freire along the lines of development concepts and objectives, focus of training, types of communication, the role of the population concerned and their participation in the programme (van't Rood, 1988, p. 42). A similar exercise is carried out by Okedara from a measurement point of view. He uses an eight-point analytical chart to compare traditional literacy with functional literacy. Besides the approaches, the criteria used include, among other things, the aims, standard level, content, duration, base-line surveys, evaluation and value (Okedara, 1981, p. 32).

Tapia Soko in his paper entitled 'Socio-economic conditionants of adult education in Venezuela' provides a general typology aimed above all at systematizing various educational experiences according to their political orientation. The main trends he refers to in the historical perspective are the following: the *cultural approach*, the *technocratic approach* and the *structural approach*.

> The *cultural tendency* corresponds to a process of homogenization aimed at incorporating into the socio-economic processes large sectors of the population that, in view of the narrowness of the formal educational system, did not have access to any other type of instruction. In this sense it corresponds to aims of minimum education developed basically through literacy programmes . . . The *technocratic approach* to adult education programmes began to be implemented parallel to the introduction of the 'developmentalist' model in Latin America from 1950 onwards . . . The *structural tendency* comes into being from 1960 onwards and involves multiple adult education programmes with differing aims (Tapia Soko, 1980, p. 37-39).

Picón Espinoza distinguishes two main strategic approaches to literacy in Latin America: the 'structural-strategic' (with an emphasis on empowerment through political change) and the strategic (having a reforming character).

> According to the *first strategic approach*, literacy is the educational component not only of illiteracy but also of the process of its solution, and it is a consequence of underdevelopment, within which context poverty is one of its basic elements. National societies, to overcome such a situation, must define and implement basic structural changes. Hence, literacy is a task of a cultural, political, social and economic magnitude with an educational dimension . . . In the *second strategic approach*, literacy is a component of a general development strategy which emphasizes its commitment and faith in the perfectibility of the present economic and social system. It is a strategic instrument oriented to reducing social inequalities to the extent permitted by that system.

A third position taking inspiration from the ideas of Paulo Freire is now emerging in the form of educational development of popular sectors of the population as an alternative to the existing literacy programmes (Picón Espinoza quoted in Fordham, 1985, p. 34-35).

The political nature of literacy has come to the surface with the attempt made by developing countries to carry out educational reforms and to integrate adult literacy into their development policies. These political ideologies have significant practical consequences in the shaping and implementing of literacy strategies. Similarly, there seems to be a relationship between the development approach followed and the corresponding strategy of literacy promotion, on the one hand, and the model of literacy promotion as politically determined by the development approach, on the other. This is eloquently illustrated by Bhola in the form of a *Political model of literacy for development* (Bhola, *The politics* . . ., 1988, p. 668-670).

Analysing the problem from a policy-making point of view, Bhola indicates that three conceptual options are available, namely:

(a) the *diffusion approach* which assumes that literacy will come through universal elementary education. As the graduates of the elementary schools enter adulthood and join the economy and as the older generations pass away, literacy will have been diffused throughout the society. This, the 'long siege' approach, seeks to eradicate illiteracy through attrition;

(b) the *selective-intensive approach* which seeks to promote literacy among those select economic regions, select occupational groups and select age cohorts which offer the highest promise of economic returns, and to work with them intensively for maximum effect. This approach accepts the central role of literacy in the process of development, but it makes segmented commitments;

(c) the literacy *campaign approach* which is a mass approach that seeks to make all adult men and women in a nation literate within a particular time frame. Literacy is seen as a means to a comprehensive set of ends, economic, social-structural, and also political (Bhola, *Campaigning* . . ., 1984, p. 34-35).

He concedes that in practice the diffusion approach has seldom been used as a deliberate policy option and that the selective-intensive approach is generally referred to as the '*programme approach*'. He concludes his analysis of eight national campaigns with the following statement:

> Looking back on the history of literacy promotion in the twentieth century, two different approaches to the eradication of adult illiteracy seem to have been employed: the 'campaign approach' and the 'programme approach'.
>
> Literacy campaigns have been national or regional in scope, involving a series of intense, well-organized activities aimed at the eradication of illiteracy within a particular time-frame. They have been urgent and combative, undertaken in the spirit of expeditions or crusades. Those campaigns that, at first sight, might seem to have dragged on for long periods were in fact campaigns within campaigns, involving a series of mobilizations, reviewing gains, rectifying errors, setting new goals, recommitting institutional support, throwing in new resources, and challenging the masses to achieve the new goals set before them (Bhola, *Campaigning* . . ., 1984, p. 196).

At the implementation level, the moving target of literacy can be demonstrated by reference to the itinerary travelled by the Arab World from fundamental education to the culturally defined 'Arab Literacy Strategy' through community development and functional literacy. According to Al Rawi:

> The Arab Literacy Strategy adopted an overall confrontation approach to the illiteracy of society, i.e. its cultural backwardness, in a direct and definite way, by political decision and determined popular will. The objective of the strategy is to emancipate Arabs from both alphabetical and cultural illiteracy . . . The new cultural concept takes account of the movement of society, cultural progress, and accompanying social changes. The strategy is founded upon a number of basic principles:
>
> - the cultural concept of illiteracy;
> - the overall confrontation approach;
> - the importance of the political decision and the people's will in a comprehensive campaign;
> - elimination of the sources of illiteracy by generalization of compulsory primary education;
> - the integration of formal and non-formal education;
> - continuous follow-up and evaluation of all stages, steps and objectives (Al Rawi, 1987, p. 143-144).

In an analysis of the eradication of illiteracy in Pakistan, Khawaja reviews four decades of efforts largely wasted in changing strategies and approaches. For instance,

> The 1959 report recommended the following useful strategies for the promotion of Adult Literacy:
>
> 1. The use of schoolchildren as teachers in an effort to make their parents literate.
> 2. The use of undergraduate college students as adult literacy teachers.
> 3. The use of one literate adult to teach another under the 'each one teach one' approach.
>
> The New Education Policy of 1970 reiterated the importance of literacy in the context of socio-economic development WHILE the Education Policy from 1972-1980 made renewed efforts towards adult education programs and reiterated that a 'massive literacy program will be undertaken in every town and village. Literacy centres will be established all over the country, in the schools, factories, farms, union council halls and other community places' (Khawaja, 1988, p. 35-36).

Structures and organization for action

The literacy providers can be grouped into three large categories: the institutions administered or supported by governments; the non-governmental organizations, which can be local, national, regional or international; and the international agencies (Lind and Johnston, 1986; Gillette, 1985; Carron and Bordia, 1985; Arnove and Graff, 1987; Rao, Bhatt and Rao, 1980; Carnoy and Levin, 1985; Wangoola, 1983; Jones, 1988; Jabre, 1988).

The national governments play a key role in the decision to provide or not to provide literacy to the illiterate population, as well as in the nature of the literacy to be dispensed and the modalities of such provision. Besides this, in many countries more and more non-governmental organizations are initiating literacy work at different levels of action.

> Furthermore, it is increasingly becoming the case that states and NGOs turn to extra-national organizations for funding, resources and expertise, which thereby intervene in the provision of literacy to people while not representing their national state. The importance of this influence is easy to derive from . . . the role of Unesco, not only in promoting literacy and securing its status as a human right, but also in influencing individual countries and programmes as to what kind of literacy should be provided and how it should be delivered. Other UN agencies, such as the UNDP and UNICEF, have also played a role in literacy in a similar way, as have the World Bank and other international aid agencies. There can be little doubt that the participation (or intervention) of these organizations represents a further set of objectives which influence who gets what kind of literacy. These diverse organizations represent a wide spectrum of different national (or even private organizational) interests, and the UN agencies represent an even more complex forum of international agreements, so that 'who gets what' also varies widely (Lind and Johnston, 1986, p. 36).

The commitment to literacy by various international organizations, such as Unesco, UNICEF, UNDP, ILO and the World Bank, and their intervention in this field are subject to a large number of publications. Each of these agencies has its own identifiable approach to literacy. As far as Unesco's strategy is concerned, Jones wonders whether:

> Given the complexities surrounding the effective promotion of literacy, . . . Unesco's commitment to a global approach for the rapid achievement of universal literacy is justifiable? (Jones, 1988, p. 1).

The question is sometimes raised in the form of an antithesis: either universal primary education or adult literacy. This is reflected by Gillette and Ryan who note that:

> Many specialists hold that massive illiteracy will only be wiped out by priority extension of Universal Primary Education (UPE). This was a main prognosis of the first African Regional Conference of Ministers of Education, held at Addis Ababa in 1961. Twenty-two years of experience have proved them neither right nor wrong. But there are others who believe that a massive literacy campaign among adults (many of whom are parents) quickens the pulse of educational expansion and thereby hastens the day when PE becomes UPE. Retrospectively, this seems to have been the Cuban approach. Unesco has now adopted a medium approach. In a doctrinal innovation, the fourth Extraordinary Session of its General Conference (1982) opted for a dual strategy, combining formal and non-formal education: the extension and renovation of primary education coupled with renewed efforts for out-of-school literacy work among youth and adults (Gillette and Ryan, 1983, p.42).

The NGOs are diversifying and increasing their intervention in the field of literacy promotion. They have flourished in Latin America since the 1950s. In an overview of their present contributions to literacy and adult education, Garcia-Huidobro indicates that 500 NGOs are operating in Chile, 150 in Peru, and 440 in Colombia (Garcia-Huidobro, 1989, p. 11). Regarding their philosophy of development and their mode of operation, Fernandez refers to a 'mini-ideology' of NGOs centred around the following four major focal points:

1. Acting as anti-institutional 'alternatives' in search of flexibility, decentralization, simplified relationships attainable by virtue of their small size and autonomy;
2. Valuing praxis more than theory;

3. Releasing intellectual activity from the confines of academe and using it to work in a horizontal, non-hierarchical relationship with its beneficiaries;
4. Promoting popular participation (Fernandez, 1985 quoted in García-Huidobro, 1989, p. 14. Our English summary of original Spanish text).

As it appears from the literature, particularly that analysing country experiences, there is a link between the specific literacy strategy and the implementing structures. Moreover, the strategy adopted may influence programme content and various implementation components. The training strategies and corresponding content and delivery system, the choice of language(s), the nature and status of teachers/facilitators, the kind of participation solicited, etc., are moulded according to the overall strategy selected. When the same character is attributed to a given component, the rationale and the objectives aimed at are different. The use of local languages can be advocated in the name of functionality for particular linguistic groups, but the same principle is defended by the liberation theory with the aim of empowering local communities and equipping them with tools to use their culture as the starting point to question the existing reality.

Since functional literacy as an approach is closely linked to development agencies and activities, it advocates *integration* of literacy into development projects. Consequently, the literacy structures are integrated into the developmental structures. This can be in the form of setting up relevant sub-units or adding new functions to existing structures to allow them to 'take in charge' literacy. This is illustrated in French-speaking African countries where literacy programmes are part of development action. In Mali, literacy is mainly carried out by the Opération de développement rural (ORD) such as 'ODIPAC: Opération de développement intégré pour la production arachidière et céréalière'; 'ORS: opération riz ségou'; 'OMM: Opération Mil Mopti', etc. In Senegal, they are labelled 'sociétés d'intervention'. These structures may cover a whole region, as in the case of 'SODEFITEX: Société des fibres et textiles'; sometimes they intervene in more than one region as in the case of 'ONCAD: Office national de commercialisation agricole'. In Burkina Faso, 'les partenaires' are 'ORD: Organismes régionaux de développement' such as 'AVV: Autorité des aménagements des Vallées des Voltas'; 'FDR: Fonds de développement rural' or 'SEPFD: Service d'éducation et de participation des femmes au développement'. Similar agencies are to be found in other countries of this region (Dave, Perera and Ouane, 1984).

Regarding *organizational structure*, the countries can be divided into those that have a co-ordinating body and those that do not. The existence of a co-ordinating body shows a certain level of political commitment (Bhola, *A policy* . . ., 1984). Linked to this is also the principle of voluntarism and idealism, which is seen as a corollary to popular commitment. A central autonomous body is characteristic of campaigns (Bhola, *Campaigning* . . ., 1984; Gillette, 1985; Jeffries, 1967; Lizarzaburu, 1976; Lizarzaburu, 1985; Unesco Regional Office for Education in Asia and the Pacific, *Literacy situation* . . ., *Burma*, 1984; Unesco Regional Office for Education in Asia and the Pacific, *Literacy situation* . . ., *Indonesia*, 1984, etc.).

A cursory look at the existing structural patterns shows that functional programmes are also managed by central structures. These central bodies are sometimes in charge of co-ordination (former MOBRAL and present EDUCAR in Brazil; the Department of Non-formal Education in Botswana, etc.); in other cases they assume also implementation (Dave, Ouane and Ranaweera, 1986; Napitupulu, 1981; Townsend Coles, 1988).

In order to promote literacy and adult education and to achieve the goals of the National Literacy Mission (NLM), the government of India has set up the National Literacy Mission Authority (NLMA). It is an independent and autonomous wing of the Ministry of Human Resource Development (Department of Education) vested with full executive and financial powers in its sphere of work. The role of NLMA is of diversified character and includes (i) policy and planning, (ii) developmental and promotional activities, (iii) operational functions, including assistance to voluntary agencies and other NGOs, (iv) technology demonstration, (v) leadership training, (vi) resources development including media and materials, (vii) research and development, (viii) monitoring evaluation, etc. The NLMA has a Council and an Executive Committee.

Tapia Soko gives an indication on institution building based on the political orientation of the adult education and literacy programmes. He claims, for instance, that under what he terms as 'cultural approach':

> One of the basic mechanisms resorted to was the use of literacy campaigns . . . This process was implemented fundamentally by public institutions and certain private entities such as the Catholic Church (Tapia Soko, 1980, p. 38).

Similarly, for the fulfilment of the objectives implied by the technocratic approach:

> . . . the state of Venezuela created in 1959 the National Institute for Educational Cooperation (INCE); this organization functions with the participation of workers, business and the states, and has its counterpart in almost all Latin American countries (INACAP – Chile, SENA – Colombia, SENAI – Brazil, etc.) . . . Within the structural approach, various types of popular organizations have been implemented lately; one of the most significant experiences being the one promoted by CESAP (Center for the Service of Popular Action . . .) an autonomous institution that has been promoting self-sustained popular organizations in marginal sectors (Tapia Soko, 1980, p. 38, 40 and 41).

From all these ideas and examples it has emerged that differences of view about the purpose of literacy are intimately linked to the differences in political, social and cultural settings. This results in different approaches to action and to the organizational forms required to carry out and sustain this action. The major debate is whether to have a mass campaign or not. When is the smaller scale selective/intensive strategy more appropriate? What policy should be adopted regarding the language(s) to be used? What is the best methodology in what circumstances? What are the most appropriate structures and institutions for the anticipated task? What areas of work are suitable for co-operation with local NGOs and with international organizations?

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VII. SOME BASIC OPERATIONAL ISSUES: IMPLEMENTING LITERACY

The basic operational issues underlying the implementation of literacy programmes involve a series of measures of a methodological, institutional, managerial and motivational nature which have to be performed by all participating actors. These operations have to be translated into activities ranging from needs assessment, programme design, curriculum development, training of personnel, sensitization and motivation of participants, monitoring and evaluation of learning outcomes, progress and impact of the programme to the creation of supporting structures. The literature reveals the complexity, gaps and limitations of these operations, and their interdependencies with the approach and ideological stance adopted by different literacy providers in specific country situations. Experience and insights gained through local, national and global action, reflection and transformation will be analysed and grouped here under the following sections which constitute the process and strategies of implementation:

7.1 Language issues
7.2 Content of literacy programmes
7.3 Literacy methods
7.4 Materials and media in literacy
7.5 The training of literacy personnel
7.6 Evaluation

7.1: Language issues in literacy

A large number of studies and publications have attempted to elucidate many aspects of the very complex issue raised by the use of languages in education and literacy: questions of basic political rights, cultural identity, access to further education and employment, facility of transition from one linguistic context to another, etc. The problem is subject to bitter argument, particularly in relation to the harmonious development and democratization of society, the revalorization of traditional culture and the full emancipation of individuals. It has been the central concern of a large number of varied experiments and the many years of practice have yielded a good deal of information and data. According to Donald, in order to achieve emancipatory literacy in which participants become 'subjects' rather than 'objects', educators must understand the productive quality of language. Donald puts it this way.

I take language to be *productive* rather than *reflective* of social reality. This means calling into question the assumption that we, as speaking subjects, simply use language to organize and express our ideas and experiences. On the contrary, language is one of the most important social practices through which we come to experience ourselves as subjects. My point here is that once we get beyond the idea of language as no more than a medium of communication, as a tool equally and neutrally available to all parties in cultural exchanges, then we can begin to examine language both as a practice of signification and also as a site for cultural struggle and as a mechanism which produces antagonistic relations between different social groups (Donald, quoted in Freire and Macedo, 1987, p. 153).

Linguistic situation and educational challenges

The use of languages in education in general and in literacy in particular has been debated and tested against a variety of settings and assumptions. The language issue is a very delicate one, for language is a support of thought and its reflection; it is also the most elaborate means of communication at the disposal of human begins, a symbol of social identification.

Beyond the polemics surrounding the introduction and use of the participants' mother tongues in literacy courses, world experience has benefited greatly from the discussion. A large number of countries and programmes have moved from justification to experimentation and even to validation of their policy through generalization. These positive trends have helped in the search for more appropriate strategies and methodologies. However, there is no unanimity in the solutions put forward, and no definitive approaches have emerged.

Authors give detailed attention to linguistic situations particularly in contexts where languages are in contact. According to the definition given to a language and, in particular, to the classification of various dialects of a given language, there are between 3,000 and 9,000 languages in the world spread over some 200 independent states (Mackey, 1984, p. 38).

India has some 1,600 languages and 10 different scripts for a population of about 800 millions (Expert Meeting . . . , 1982). In Indonesia 150 million people unequally spread over 13,000 islands speak 418 languages. The island Irian Jaya alone, counts about 128 languages. The number of the speakers of these languages varies from few hundreds to 60 million (Nababan, 1982). In Africa, South of the Sahara, the total number of languages varies between 1,250 and 2,100 according to the estimates. Certain countries such as Burundi, Madagascar, Rwanda and Somalia have one language (Training seminar . . ., 1981, p. 8-9), whereas in Cameroon, 10 million people use 236 languages giving an average of less than 50,000 individuals (Tadadjeu, 1987, p. 11). Three languages in Africa South of the Sahara are used by more than 30 million people: Hausa (30 million), Swahili (40 million) and Arabic (70 million) (Training seminar . . ., 1981, p. 8-9).

In Latin America, behind the use of Spanish and Portuguese, is hidden a large diversity despite the disappearance, through disuse, of a great number of Indian languages.

In Central America, some 70 languages are spoken by about 6 million people. Six hundred other languages are used by some 11 million individuals in this part of that sub-continent. The most significant Indian communities are to be found in the

Andean area where Quechua is used by some 6 million people from Colombia to Chile (Crystal, 1987, p. 284 and 322).

Because of the internal linguistic and cultural diversity which characterizes all the countries of the world, strictly monolingual countries can hardly exist if we define them according to rigorous criteria. In multilingual countries, situations vary widely, depending on the history, socio-economic context, value system and ethnic composition of the population. A typology of language situations in multilingual settings is presented in Bijeljac-Babic, 1983; Expert meeting . . ., 1982; Houis, 1976. In what language, then, should a person learn to read and write? In many developing countries there is no easy answer to this question. Most such countries have many languages, so there is usually a choice between providing literacy in: (a) the official national language only (which is sometimes a foreign language); (b) all languages spoken in the country; (c) all languages spoken by sizeable groups of the population; or (d) a more limited selection of languages (Stanford, 1981, p. 176; Houis, 1976; Ouane, 1980; Sow, 1977; Bamgbose, 1976; Dumont, 1976; Wagner, 1987).

Integration of national and local languages into literacy: arguments and counter-arguments

The arguments for and against the use of local languages are influenced by political factors, socio-economic justifications, psychological facts and technological considerations. Houis and Bole-Richard distinguish four attitudes towards this question. They characterize them in self-explanatory words as: (1) expectative or passive; (2) technicist; (3) integrative; and (4) prospective (Houis and Bole-Richard, 1977, p. 20-23). According to Bamgbose the debate on the use of these languages and the feasibility of an education based on them has centred on arguments at three levels: theoretical, experimental and practical. At the experimental level:

> Arguments for or against the mother-tongue medium are difficult to assess because of the differences in the conditions under which particular experiments have been carried out as well as the probability of bias on the part of researchers. Where there is a policy of promoting a language of wider communication such as English or French, it is quite possible to create conditions in which the superiority of instruction in these languages can be demonstrated. Where, on the other hand, there is a commitment to mother-tongue education, the opposite results may be expected and even achieved. It is important to draw attention to this point because of the conflicting results often obtained from bilingual education experiments and the misplaced enthusiasm of some researchers to generalize results obtained in some experiments to situations of different socio-economic and socio-linguistic character (Bamgbose, 1984, p. 87-88).

The political arguments and counter-arguments for the use of local languages in multicultural and multilingual surroundings are centred around the issue of 'national unity'. It is obvious that the use of a common language can help to strengthen national unity through the mutual comprehension and integration thus established. From this assumption, certain authors and a large number of decision-makers in developing countries have induced that promoting a large number of languages constitutes a barrier to national unity. The fear of accentuating national opposition, and of missing the opportunity to be part of the formidable movement of circulation and exchange of information and data, is explicitly evoked to justify and maintain the use of one language, or a limited number of languages or even a foreign language as the official language(s). According to the experts called by Unesco in November-December 1981:

> Monolingualism can in no way be identified with the concept of nationhood. Even if use of a common language favours unity, monolingualism cannot be considered as an expression of national unity. The plurality of languages should be perceived as part of a nation's wealth. It is, in fact, the reflection of a plurality of cultures. Languages may be considered to reflect different ways of life. The motto of Indonesia, 'Unity in diversity', perfectly summarizes this point. Relationships of interdependence rather than dominance and subordination will contribute greatly to national integration. The co-existence of several mother tongues will not only promote languages of wider communication to bind people together, but will also encourage greater understanding of different cultures (Expert Meeting . . ., 1982, p. 7).

In his historical review of the role of linguistic research in experimental literacy in mother tongues in Cameroon, Tadadjeu concludes his arguments with the following formulation:

> One of the principles followed in research practice, which could help to meet the Babel-like challenges in this country is therefore that of continuing multilingualism. In other words, the facts reveal to those who want a unified language as an expression of the national unity of Cameroon that this unity is a unity in linguistic diversity. Such a statement is in line with the modern tendency characteristic of most contemporary countries. Practically no country in the world is still aspiring to that linguistic autarchy which is national monolingualism (Tadadjeu, 1987, p. 12-13. Original French. Our translation).

Socio- and psycho-linguistic arguments are rooted in the culture and the historical heritage of the countries concerned. The capacity of languages to apprehend and reflect the world is at stake. Languages having a long tradition of literacy are better equipped to explore the vast domain of science and technology than the languages having very recent access to written communication. Another facet of this problem leads to the debate about language prestige and functions on the one hand, and the broad issue of *parity* and *equality* of languages, on the other. The question is whether such an equality exists or is attainable. According to Mackey:

> All languages are equal only before God and the linguist! If all languages possess the same potential they do not all have the same currency for all things and for all people. They may be, however, entirely sufficient in the cultures and for the peoples that have used them. Each culture has the language it needs to function. If needs change so must language. The founder of modern linguistics, the great Swiss philologist Ferdinand de Saussure, was fond of comparing words to currency, the value of whose units being both arbitrary and conventional. When it comes to the value of languages themselves and their usefulness, this comparison seems equally valid. Some currencies are more valuable than others, more current, better known, more universally acceptable and more stable (Mackey, 1984, p. 43).

Addressing the same issue in the context of ex-Portuguese African colonies, Freire and Macedo stressed the fact that behind the language superiority issue is hidden a struggle for power through the process of empowerment. They pointed out that it is of paramount importance to give top priority to the students' language as the primary language of instruction in literacy. It is through their own language that they will be able to reconstruct their history and their culture. Nevertheless, these authors insist on the fact that:

> Although the concept of voice is fundamental in the development of an emancipatory literacy, the goal should never be to restrict students to their own vernacular. This linguistic constriction inevitably leads to a linguistic ghetto. Educators must understand fully the broader meaning of students' 'empowerment' . . . This means that educators should understand the value of mastering the standard dominant language of the wider society. It is through the full appropriation of the dominant standard language that students find themselves linguistically empowered to engage in dialogue with the various sectors of the wider society. What we would like to reiterate is that educators should never allow the students' voice to be silenced by a distorted legitimation of the standard language. The students' voice should never be sacrificed, since it is the only means through which they make sense of their own experience in the world (Freire and Macedo, 1987, p. 151-152).

Politically it is possible to avoid linguistic discrimination in providing equal opportunity of promotion to all languages, but in practice it is impossible for all languages to acquire an equality of roles and functions and the resulting equality of prestige and status. In reality such an equality is not necessary. In a multilingual context different languages and linguistic forms play different roles. What has to be aimed at is a dynamic complementarity of roles and functions of existing languages. In terms of ease of multilingual acquisition, the nature of the differences in the language of the home and the language of literacy is of decisive importance.

> These differences, whether they are at the level of language, dialect or register variation, in written or spoken form, must be fully considered. In addition to the differences in linguistic forms themselves, genre conventions and narrative structures in written texts, as compared to other forms of language use, must also be taken into account as part of the knowledge that is acquired along with different vocabulary and syntactic structure. Furthermore, these differences in the organization and use of literate materials point out how different social groups organize and value the presentation and display of knowledge, also part of what the learner must master in becoming competent. In the case of linguistic minorities, or where there is no established tradition of early literacy socialization in the home, the school or the literacy centre must fill in (Schieffelin, 1987, p. 155).

Economic and technological reasons are often put forward to postpone the integration of local languages into literacy or to opt for approaches influenced by economic or technological factors. Prior to its introduction into an education programme, a language should be usable for literacy. The need to build up a large number of languages to transform them into subjects and means of instruction is a formidable undertaking, which is estimated to be extremely costly in terms of financial and material investments. This is further complicated by the influence of type of languages on literacy training as specified by Gray (Gray, 1956, p. 31-60). According to Ferguson,

> If judgements of backwardness or limited development of a language cannot be made on the basis of linguistic structure, how can they be made? The view adopted here is that there are at least three dimensions relevant for measuring language development: graphization – reduction to writing; standardization – the development of a norm which overrides regional and social dialects; and, for want of a better term, modernization – the development of inter-translatability with other languages in a range of topics and forms of discourse characteristic of industrialized, secularized, structurally differentiated, 'modern' societies (Ferguson, 1968, p. 28).

The need to observe the linguistic pertinence and specificity of the languages leads many specialists to advocate the use of graphic signs not to be found on current typographic keyboards. Producing reading materials in large quantity and for wide fields of interest is considered a barrier to the use of such languages in literacy instruction. Nevertheless, as Mackey clearly states:

> Today it is technically possible to offer mother-tongue literacy in any local dialect of any language . . . In sum, the technology for mass literacy in the mother tongue is now available and could be applied to each of the world's thousands of local languages. It is possible that eventually each of the world's thousands of languages would become a vehicle for schooling at all levels. But would the effort have been worth it? . . . Many nations throughout the world are today faced with this unpleasant dilemma. If, for ethnic or nationalistic reasons, they promote an unproductive tongue, they may, to that extent, diminish the potential of their people for economic and scientific development. On the other hand, if they fail to develop their national languages these will always remain secondary instruments of communication. These tongues will not only remain as they are: they must proportionally regress, as areas of knowledge expand (Mackey, 1984, p. 42, 44 and 45).

This is not the view held by the promoters of *African Language-Horizon 2000*, which is an overall project for the promotion of African National and Regional Languages (Sankale and Guillot-Pingue, 1987, p. 324). A middle position is generally advocated between the two extreme attitudes represented by the use of all languages, which is financially and practically impossible, and the imposition of one language (sometimes a foreign one), which is culturally and politically unacceptable. This alternative line takes into account the evolution and dynamism of the languages in contact to promote a gradual bilingualism. This bilingualism, which can also be multilingualism, is based on selected languages without neglecting the development of the others. In some cases, three, four or even five languages, the knowledge of which is highly desirable, are used according to the stratum of communication. Theoretical arguments, practical experiences and alternative hypothetical constructions are given in Houis, 1976, Bamgbose, 1984; Bijeljac-Babic, 1983; Ryan, 1985; and Poth, 1988.

It is frequently mentioned in the literature that some supporting measures should go along with the difficult problem of choice of language/languages. Creating a literate environment favourable to the use and promotion of the local languages is of supreme importance. What is understood by such an environment? How can it be created? Lazarus points out the following about a learning environment:

> A literate environment implies the development of an infrastructure to ensure, firstly, the easy availability of written material, newspapers, books, pamphlets, leaflets, etc., for the new literates at the level of their understanding; secondly, the possibilities of further education provision through evening schools, correspondence education, etc.; and thirdly, the possibilities of new literates to become their own 'agents of change' by using their new skills in work and in their social and personal lives. Thus, a literate environment creates and ensures a cultural, economic and social environment favourable to the retention of literacy and continuing education (Lazarus, 1982, p. 68).

In practice, the choice to be made depends on a combination of factors. The situation evolves and sometimes changes according to the country. Hence, certain countries such as Indonesia, Thailand or Kenya have opted for monolingual literacy. Other countries such as Benin, Burkina Faso, Guinea and Mali have opted for a multilingual literacy. The United Republic of Tanzania started to provide literacy in five languages prior to the imposition of Swahili as the only language to be used for this purpose.

Ethiopia, on the other hand, has started by imposing one language as a vehicle of literacy, then moved to a five-language formula and finally extended the number of languages to fifteen, covering thereby the major languages of the country.

It is generally admitted that although language instruction is now well-founded both in theory and practice, there is no question of reducing it to a few formulae or a hallowed list of set procedures. This process is related to the education and development programmes. Besides changing the language of instruction, the content of education itself should change and primacy be given to the mode of reasoning and understanding employed by the literacy participants. It would be altogether illusory to attempt a delineation of practical tasks to be performed on the basis of pure linguistic criteria (Poth, 1980; Coombs, 1985; Unesco, 1988; Delcroix-Howell, 1987; Barbin, 1980).

War is too important to be left to the generals. The same goes for language which is too much of a social institution to be solely left in the hands of linguists. This is specially true of linguistic engineering, which should be entrusted only to multidisciplinary teams.

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7.2: The content of literacy programmes

1. *Goals and aims*

The content of literacy will be determined by its goals and aims which are manifested through the criteria for and definitions of literacy, a topic which has been analysed and presented earlier in Chapter III. These criteria may be derived from the conceptual dimensions of the definitions such as social, economic, psychological, cultural, ethical, aesthetic and epistemological; and from operational objectives such as functionality, participation in civic life, self-realization, creativity, income generation, critical thinking, conscientization, liberation and domestication.

In the early, stages, when literacy was understood purely and simply as the ability to read and write, the content was concerned more with basic literacy skills than with the broader objectives mentioned above. The Club of Rome analyses the criteria for literacy learning in the framework of the concepts of *maintenance* and *innovative* learning:

> Whereas maintenance learning, with its stress on language, equates literacy with reading and writing, innovative learning encompasses a basic competence in all elements of learning within the framework of literacy. In innovative learning, the stress is on the value or ethical dimension of literacy, not unlike those concepts of literacy that focus on raising consciousness and increasing the capacity to participate effectively and productively in society (Botkin, Elmadjra, Malitza, 1979, p. 75).

They strongly advocate a wider concept of 'literacy' that extends beyond reading and writing to include especially an ethical and aesthetic dimension, and they conceive literacy as a means of increasing people's consciousness and their ability to participate constructively and ethically (Ibid, p. 91-92, p. 130).

The wider concept of literacy stated above and in other definitions (see Chapter III) sets out the goals and aims of literacy from which criteria for determining the content could be derived, and the contexts and influences identified.

Considering literacy as 'an act which opens out the world' not confined to the deciphering of characters, associating sounds with visual symbols and learning of words, Naik refers to the different contexts which are essential for entering into the world of literacy as follows: socio-cultural context, economic context and political context against the backdrop of contemporary national/world situations (Naik, 1987, p. 74).

Langenbach refers to four influences mentioned by Newman that affect adult learning and demonstrate how knowledge of these four can help in planning and providing literacy training and hence in the selection of content: cultural, physiological, psychological and educational (Langenbach, 1988, p. 81-84).

The focus needed to shatter the 'culture of silence' and empower the people is stressed by Bhola in proposing the following specifications for the educational context of post-literacy and continuing education:

> . . . in addition to meeting the immediate developmental and instrumental concerns of neo-literates . . . make provisions for teaching universal values, generalized abilities, and aspects of art, science, technology, communication, citizenship, and human relations (Bhola, 1988, p. 224-225).

The concept of shattering the culture of silence and empowering the people is dominant in countries where literacy campaigns have been part of a social and cultural revolution in which the content incorporates ideology, and literacy programmes are carriers of new ideas to educate, mobilize and train the population for national goals (International Council for Adult Education, 1979, p. 45).

The National Literacy Campaign of Nicaragua, which endeavoured to put into practice a number of Freire's pedagogical concepts, principally those which conceive adult education as a political process involving consciousness raising, provides a typical example of this trend.

According to the curriculum developers, the materials used in the literacy and post-literacy educational campaigns were designed to prepare people to play an active role in creating a more prosperous and just society (Arnove, 1986, p. 23-24).

2. *Approaches: questions of integration and balance*

Several issues have been raised with regard to the different approaches and strategies adopted for developing the curriculum content. One of the earliest issues was concerned with the integration of vocational and technical elements in the literacy curriculum and striking a balance between vocational and 'pure' literacy skills. The experience of the Experimental World Literacy Programme (EWLP) is reported as follows:

> Efforts were intended to bring about two kinds of integration in particular: between the three R's on the one hand and additional (especially vocational) subject matter, on the other; and between theoretical and practical aspects of subject matter. The systematic extension of literacy curricula to include, in addition to the three R's, other (vocational) subject matter was a major innovation of EWLP. In this regard, the balance between the two subject areas varied widely from project to project (Unesco; UNDP, 1976, p. 160).

Referring to the conclusion of the initial evaluation of EWLP, an ICAE study states:

> The initial evaluation of EWLP concluded; the integration of the educational content increases the effectiveness of functional literacy work (Unesco/UNDP SIPA 2, 1975, p. 46).

The document also stated that studies undertaken for global evaluation confirm the following:

> - The more the content centres on problems that workers actually encounter in their productive activities, the more effective is training; and
> - The more the content and materials take into account the cultural environment of the workers, the more effective is the training (International Council for Adult Education, 1979, p. 46).

Responsibility for decision making in developing curriculum content has emerged as a major issue which raises a series of questions concerning individual needs versus State purposes, elitism versus populism, participation versus representation, and centralization versus decentralization. In this context Bhola suggests a dialectical model 'for re-inventing' the collective vision of the elite within the local settings:

> We suggest that both the national visions projected by the developmental elite at the centre and the aspirations of the people expressed by the local communities must become part of the curriculum content, both of its organization and its implementation. The key words here are collaboration and participation. All curricular plans must be validated by curriculum developers in collaboration with public and private interests at the various levels. At the local community level, the collective visions of the elite must be *re-invented* within local settings with the participation of the communities . . . the content, organization and delivery of curricula must arise from a dialectic between the national vision and community aspirations (Bhola, in Miller, 1986, p. 60).

The need for maintaining a balance between the areas of local specific needs and national core content areas derived from national and common problems in developing the content is reiterated in the Indonesian Kejar Programme (Napitupulu, 1981, p. 15).

The Thematic Investigation Approach proposed by Freire as opposed to the technocratic models which are prescribed from outside by government authorities, agencies or individuals is asserted to be better suited to raising the consciousness of the learners (Freire, 1970).

In considering a series of questions about the content of adult literacy, the Elsinore Conference (1949), examined the place of intellectual disciplines in literacy curricula in relation to community needs, vocational education, economic, social and political content, the place of science and art, recreation, etc. The need for a functional approach as against the traditional intellectual one emerged from the conference as asserted by Bhola:

> . . . Elsinore considered the special role of literacy in adult education. Despite the variety of forms encountered, Elsinore saw a 'unity of inspiration for adult education the world over'. The unity of inspiration was enriched with the diversity of aspirations and needs of adults in various economic, social and political contexts; and curriculum content had to take in view the various 'centres of adult interest' in different concrete situations. Starting from the statement that adult education must satisfy all three impulses of the individual adult – intellectual, social and artistic – the conferees at Elsinore in pursuing the practical implications of their own discussion came

down in favour of a 'functional approach to education as against the traditional intellectual one' (Bhola, 1988, p. 98-99).

Based on such considerations, the conference specifically named such topics as popularization of science, food and nutrition, and population as elements of the content of adult education.

The aforesaid functional approach leads to a 'basic needs strategy' for developing the literacy curriculum bringing it closer to 'basic education' with the inherent dangers associated with that concept (see for example, Ochs, 1981, p. 263).

The Paris Conference (1985) recognized the need to link the content to the clientele and recommended that the content should cover not only basic literacy but cultural literacy and technological literacy as well (Bhola, op. cit., p. 101-102).

The difficulties involved in developing curricula in the context of a system of continuing education (including literacy) are stated by Perera. He suggests that a framework proposed by Alles (1975) which postulates a 'typology of life tasks', one relating to 'maintenance and survival and the other relating to developmental adaptive growth' that a learner will need to develop, would be a promising approach (Perera, 1987, p. one-20-one-21; Alles, 1975, p. 239-254).

3. *The minimum learning package*

In attempting to answer the question of 'what is the essential content of adult literacy?', several curricula could be identified in the literature, all having common elements organized as an 'essential minimum package' or 'core content'. Coombs defines the essential minimum package in the following terms:

- Positive attitudes . . .
- Functional literacy and numeracy . . .
- A scientific outlook and an elementary understanding of the processes of nature . . .
- Functional knowledge and skills for raising a family . . .
- Functional knowledge and skills for earning a living . . .
- Functional knowledge and skills for civic participation . . . (Coombs, Prosser, Ahmed, 1973, p. 14-15).

As opposed to the precise functional terms used by Coombs to define educational content in the context of a rural community, a Unesco Meeting of Experts on the Basic Cycle of Study (1974) 'regarded the problem from an international standpoint and, in their efforts to find a common denominator to so many different situations, the experts had great difficulty in defining types of content that would be valid in all circumstances' (Ochs, op. cit., p. 267). The conference defined the content in terms of a set of general objectives and made some general recommendations only on content (Meeting of Experts . . ., 1974, p. 4-5).

Bhola makes a distinction between the 'essential content' and the 'content relevant to the time/life/space contexts of adults daily lives' and enumerates a set of values and abilities forming this essential content. Asserting that 'curriculum content' cannot be divorced from constituencies and clients, he formulates a 'pragmatic content' of adult education (Bhola, 1988, p. 102-104).

Bonanni advocates another strategy in which the 'content-cores' constitute the functional and the principal components of the curriculum. 'They should not relate to subject-matter, neither to traditional themes like health and nutritional education, but should convey messages *in what and how to do terms*'. Instead, he proposes that:

> . . . each functional content-core should be complemented by a series of learning elements, having diverse nature. Such elements should be developed from, and linked with the functional ones. We now see that five different types of components should basically constitute the *corpus* of curricular elements. They include: (i) *Functional core-components*: instructions on practices, needed to be implemented, for transformation; (ii) *Rational components*: mathematical and scientific concepts arising from the functional core-component; (iii) *Socio-economic components*: information on the social implications of each transformational practice and on their economical aspects and outputs; (iv) *Socio-cultural components*: individual and group behavioural dimensions of the new practices; (v) *Written communication components*: analysis and fixation of the linguistic and arithmetic written forms of messages related to all the above-mentioned components (Bonanni, 1982, p. 19).

A study conducted in Sri Lanka, while asserting that the specification of the content of a minimum learning package is indeed a challenging task in view of the heterogeneity found in a literacy target group, recommends an operational framework for developing such a package (Gajanayake et al., 1986, p. 52).

In spite of attempts to develop minimum learning packages and core curricula meant for general use, it is often maintained that the content should be specific and relevant to a given target group. Hence, Oxenham (1975) and others argue that large general programmes and standard curricula are inappropriate. 'One alternative is small, local programmes catering to specific clientele. Within small groups having common traits, needs, or functions, it is possible to provide general programmes of wide relevance' (International Council for Adult Education, 1979, p. 47).

Discussing the pros and cons of basic learning modules, Bonanni proposes a two-stage operation of identifying the skills needed to help learners to overcome their problems and then building learning units around those skills (ibid, p. 49).

A much publicized example of Bonanni's skills-oriented problem-solving approach is the Farmers' Functional Literacy Project in India, where the content was based on the problems encountered by farmers and included functional literacy as well as farmers' training (ibid, p. 49; Bhola, Müller, Dijkstra, 1983, p. 176).

4. *Representative samples of content from different countries and programmes*

A general survey of sample curricula from different countries and workshops suggest that, while recognizing the principle that 'adult learning is different from children's learning in many ways and that the materials used for child instruction in the formal school system cannot readily be used for adult literacy purposes', they have followed a variety of approaches ranging from the intellectual content of traditional school subjects, via integration with vocational elements to topics which have come into vogue in recent times such as environmental issues, population, peace and disarmament, and science and technology. It is also found to be difficult to draw a sharp demarcation between curricula for adult education, adult literacy, post-literacy, basic education and non-formal primary level education. They all have elements common to what may be referred to as 'literacy programmes' and attempt to cover the cognitive as well as psycho-motor and affective domains.

The following examples will serve to illustrate the concepts, approaches and the philosophical foundations on which the curricula are based.

- Literacy and numeracy related to water – a series of lesson units to show how an integrated approach could be used to teach literacy and numeracy besides knowledge, skills and attitudes pertaining to health and hygiene (Roberts, 1982).
- The learning package A Kejar Programme (Indonesia) – A learning package designed to meet the minimum essential learning needs of the people 'plus-minus' the curriculum of the primary school (Napitupulu, 1981).
- The functional literacy curriculum of Thailand – An adult functional literacy curriculum based on indigenous culture guided by Thai Buddhist values aimed at developing a 'Khit-pen' person (Sunanchai, 1981).
- 'Ram and Shyam open a tea stall' – Learning episodes for motivating out-of-school children (Dave, 1979, Appendix 1).
- Model curriculum for non-formal education of village children from age 6 to 11 years – A comprehensive curriculum where the content is defined in terms of objectives (McLevy, 1978, p. 256-266).
- A matrix of levels and activities – a matrix of possible post-literacy programmes corresponding to four levels of basic education: semi-literacy; partial literacy; elementary literacy; and functional literacy (Müller, 1986, p. 34-35).
- The post-literacy curriculum of Tanzania – A follow-up programme designed to equip men and women with more literacy, social and vocational skills and to change their attitudes, norms, behaviours and feelings (Ibid, p. 207).
- The Sarvodaya Model of Sri Lanka – Based on the spiritual traditions of the East (mainly Buddhism in this case), includes a moral element, a cultural element, a spiritual element, a social element, a political element and an economic element (Bhola, 1988, p. 106; Macy, 1983).
- Thailand's Functional Literacy Programme – A curriculum based on potential problems existing in village communities in agriculture, health, economics, civics (Sunanchai, 1981, p. 53-66).

In spite of attempts made in many countries to develop innovative curricula for literacy, a careful analysis of such curricula shows that often there seem to be gaps, and even inconsistencies and contradictions, between the needs, objectives and the content. For example:

> In several Asian countries, traditional adult education programmes have been literacy-oriented, aimed at teaching adults to read and write. Despite several techniques, such as the subject-oriented approach, problem-solving approach, work-oriented literacy, and conscientization method, evolved and used over the years, the emphasis has been on how the adult can be taught to master 'the magic key' to literacy. Obviously, such programmes have not attracted the poor and illiterate adults nor have they convinced them of the value of literacy in their lives (Unesco Regional Office for Education in Asia and the Pacific, *Curriculum development in literacy*, 1981, p. 50-51).

Similar observations are made regarding the existing curricula in Latin American countries:

> Harmony is not always achieved between the general objectives and those of the increasingly specific and concrete spheres . . . The objectives generally include the 'cognitive dimension' but ignore the 'psycho-motor' and 'emotional' aspects . . .
>
> The contents used in teaching these subjects are unrelated to the adults' real lives and in their breadth bear some resemblance to an encyclopedia . . . (Chaparro, 1986, p. 39).

The contents destined for women are often confined to gender stereotype experiences, while even those experiences are sometimes meaningful only to urban women and not related to the lives of rural women (see for example, Ramdas, 1985, pp. 95-105).

5. *Some problems and issues*

A problem faced by curriculum developers is to design curricula in literacy which are at one and the same time both *relevant* to the needs and interests of learners and which are *equivalent* to the curricula in use in the main stream.

Bhola raises another issue concerning the balance between the 'liberal and the utilitarian':

> Adult education may be struggling for its soul. Its essential message, rooted in universal values and learning to learn, may be getting lost in basket-weaving, professionalization of labour, indoctrination and the selfishness of self-assertion. The issue we face is how to keep the body and soul of adult education together. How to combine the liberal and the utilitarian? (Bhola, 1988, p. 107).

Such issues concerned with the relevance and balance of the curriculum have to be considered at the micro-level in terms of the priorities of the learners.

It is often reported that the content of literacy curricula do not motivate adults and are not capable of sustaining their interest sufficiently long to help them master the skills of literacy (Unesco Regional Office for Education in Asia and the Pacific, *Curriculum development in literacy*, 1981, p. 51).

One reason for this may be that:

> Quite often subject specialists, instructors, and even extension agents are asked to formulate a curriculum. Most frequently, curricula designed in this manner are based upon intuition and subjective opinions, and experiences having no relevance to the realities of the learner-group situations (ibid, p. 51).

This shows the importance of conducting a needs assessment and ensuring the participation of all personnel at all levels – including the learners – involved in a given programme in developing the curriculum.

The debate on the 'adult knowledge' approach to a curriculum theory of adult education has relevance to the literacy curriculum too. Since the formal school system and its curriculum (the so-called 'dominant paradigm') are well established there is a tendency to take them as the standards for all educational enterprises including literacy learning. Hence the question has been raised whether there is a need for a new framework for adult literacy learning based on 'adult characteristics' and distinct from formal school learning. Griffin raises the key issues involved in this conflict and concludes that:

> . . . in constructing an adult curriculum, then, the issue is not one of establishing priorities in terms of forms of knowledge but of establishing them in terms of the purposes of learning – the uses to which knowledge is put . . . (Griffin, 1983, p. 39, 52).

The andragogy/pedagogy dichotomy (Knowles, 1978) introduces another dimension to this debate. Knowles' 'idea of andragogy as a name for a science of adult teaching and learning in contrast to pedagogy as a name for the science of childhood learning' has significant implications for the adult literacy curriculum:

> . . . [the] assumption is that children have been conditioned to have a subject-centred orientation to most learning whereas adults tend to have a problem-centred orientation to learning. Children, in other words, require subject-knowledge not for its own sake but because it is instrumental to passing through the education system itself. Adults, by contrast, come to education because they need knowledge for immediate purposes of solving day-to-day problems of living. This assumption, says Knowles, has major implications regarding the organization of the curriculum and its learning experiences' (ibid, p. 57, see also Knowles, 1978, p. 56).

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7.3: Literacy methods

Appropriate methods determine the quality and effectiveness of the teaching/learning process, thus influencing the success of a literacy programme, learners' motivation, the dropout rate and absenteeism. How can learning be achieved? How do adults learn? How does adults' learning differ from children's learning?

Hamadache and Martin summarize some of the principles acknowledged as typical of adult learning and important for their acquisition of literacy:

> People in a learning situation want to be viewed from the standpoint of their entire adult personality, not solely in relation to their temporary role as students...
> Adults possess an ever-abundant stock of impressions, reflections, judgements, feelings, and happy or unhappy experiences. This is the main stuff from which educational experience is built up, with the addition of whatever is ingested from outside (Hamadache and Martin, 1986, p. 48).

This is further supported by Knowles in his theory of andragogy (1985).

1. *Defining literacy methods*

The question 'how' stresses the educational process and leads to the use of terms such as methodology, methods, material, media, devices, techniques, etc. The meanings attached to these concepts and the way they relate to each other demonstrate the existence of a range of theories and even of individualized understandings. Most authors therefore define their perception of these concepts. Commenting on the methodology of education programmes de Clerck makes the following clarification:

> We use the term 'method' in its etymological sense to refer to the way chosen by the teams of participants to reach the goal which they have set for themselves in the context of a particular situation, the situation being the problem chosen as the topic to be covered and the goal being the acquisition by the group concerned of knowledge and skills which they can use in their environment and of attitudes which will assist in the solution of the problem. The educational methods used to achieve this aim will provide, depending on the situation, the means of deciphering the written or printed message, of solving simple arithmetical problems arising in everyday life . . .
>
> The educational programme must suit its methods to the situation: literacy training activities, demonstrations, groups discussions, self-teaching methods, the projection of films, or slides, reading material, puppet shows, etc (Clerck, 1976, p. 42)

Bown and Tomori refer to the distinction made by Verner between methods, techniques and devices – three elements often mentioned while discussing the adult education and literacy processes:

> The method is 'the way in which people are organized in order to conduct an educational activity. A method establishes the relationship between the learner and the institution or agency through which the educational task is accomplished'. Methods may be individual, such as correspondence study or apprenticeship; group-related, such as classes, discussion-groups and seminars; or community-related, such as mass campaigns.

> The technique is the way in which the tutor helps the learner to establish a relationship between himself and the learning task. Different techniques are effective for different learning tasks. For learners wanting information, such techniques as lectures, debates and written study-guides are appropriate. For learners wanting to acquire a skill, there are such techniques as process-demonstration and role-play. For learners wishing to apply knowledge gained . . . there are such techniques as group discussion, project-work and field-work.
>
> The term 'device' is a convenient way of identifying the many instructional aids that extend or increase the effectiveness of methods and techniques, but which cannot themselves instruct. Items in this category range from instructional materials to communication media and from illustrations to the arrangement of 'furniture' (Bown and Tomori, 1980, p. 108-109).

Comings and Kahler (1984, p. 19) refer to method as strategy, i.e. a theoretical base on which a comprehensive set of activities is built supported with consistent materials and techniques. They distinguish three major strategies used in literacy programming today – the Laubach method, the Freire method and the Functional Literacy method.

In a post-literacy research project conducted by the Unesco Institute for Education, the term 'learning strategy' is used to mean:

> All the procedures, methods, techniques, activities and structures designed and set up to provide and sustain post-literacy learning (Ouane, 1989, p. 5).

'Learning strategy' is used in this case as a generic term to cover methods, materials, media, resources and sometimes even their combination.

According to Bhola, the methodology of literacy constitutes its soul and adult educators have been so preoccupied with the methodology of teaching adults that, for a long time, the whole field was reduced to such a study. The methodology of adult education can become confounded as methods are actually used in a multiplicity of adult education encounters. One could say that the various methods of adult education in use today assume a pattern of tension between a pole composed of humanistic orientation with its focus on commitment and policies through a 'pedagogy of the oppressed'; and another pole based on goal orientation with emphasis on competence in search of performance through the pedagogy of the dysfunctional (Bhola, 1988, p. 110; 113 and 114).

2. *Developing literacy methods*

The discussion about the definition of methods sheds light on a continuous process marked by constant redefinitions according to the content transmitted, the structural context and the social dynamics of the entity and the groups within which the methodology is used.

The concept of teaching/learning methods is a multidimensional one, discussed and presented according to different aspects: the presentation and structure of the content, logical procedure, means of communication used, organization, the effect on the participant, the various phases of the teaching/learning process, the specific methods of presentation, the focus either on teaching or learning, etc. (Gray, 1956; Unesco, *Practical guide* . . ., 1973; Unesco, *The training* . . ., 1973; Bataille, 1976; Hamadache and Martin, 1986; Bhola, 1988; Bown and Tomori, 1980; Cipro, 1976).

The historical development of methods has followed the strategic movement from traditional literacy to literacy for empowerment through the functional literacy dimension. This evolution can be reflected in the form of a curve from the focus of classroom matters to the creation and use of tools for transformative interaction between learners, co-learners and facilitators, between participating actors and the surrounding environment.

Two eminent educationists have laid the foundations of the 'pure literacy methods' of modern times namely Gray and Laubach.

As traditional literacy was chiefly concerned with the acquisition of the '3Rs', the learning methods were frequently referred to as reading methods (Gray, 1956; McKillian, 1964; Hamadache and Martin, 1986). Gray summarizes the findings of an international survey referring to terminological differences concerning various aspects of reading such as 'synthetic' and 'analytic' (psychological processes); 'alphabetic', 'phonic', 'word' and 'sentence' (speech or language unit); 'global' and 'ideovisual'; 'auditory', 'visual' and 'kinaesthetic' (Gray, 1956, p. 75-76).

An abundant literature is devoted to the Laubach Method, which is now spread throughout the world by a specialized institution, Laubach Literacy International. The Laubach Method is a comprehensive system using a 'one-on-one method', called 'each one teach one', by which one literate volunteer teaches one illiterate person. That newly literate person devotes time to teaching another illiterate person on a voluntary basis. Besides this teaching methodology, it also includes a set of didactic materials, together with the required follow-up reading matter (Laubach, 1947; Laubach and Laubach, 1965; Comings and Kahler, 1984). Comings and Kahler give the following description of this method:

> The Laubach method uses a highly structured curriculum and standardized teaching materials. The basic Laubach teaching tool is a pre-designed picture-letter-word chart. Each picture on the chart has been carefully chosen to represent both the shape of the letter to be learned and a word that begins with that letter (Comings and Kahler, 1984, p. 20).

Learning is often qualified as the outcome of an interaction taking various directions and involving people, materials, media, situations, communications, etc. Three types of interaction are particularly referred to:

(i) Interaction with the teacher, where the teacher plans the programme and directs it. There is a clear hierarchy and the roles are fixed. This type of interaction results in Guided Learning with the direction being determined mainly by the teacher.

(ii) Interaction occurs among the participants who learn from each other in a co-operative atmosphere. The roles of teaching and learning are constantly reversed during such interaction and learning is horizontal. This results in Inter-Learning.

(iii) Interaction of the learner with certain media and materials, e.g., textbooks, audiocassettes, etc. Such interaction gives rise to Self-Learning or Individualized Learning.

The interplay of these and many more factors in any learning situation has induced several authors to attribute changes to teaching behaviours, to favour particular methods as being more suited to selected objectives, learning aspects or situations. Learner-centred, student-oriented, democratic methods are opposed to those which are teacher-dominated, authoritarian or, as Freire puts it, 'banking' – each claiming their success and victory over the other camp with little convincing evidence which could exclude the contribution of other variables and methods to the triumph of their 'method'.

Besides teaching behaviours or styles, other criteria include the presence or absence of direct mediation by the teacher (face-to-face versus distance); the individual tailored methods which are contrasted with small group learning techniques; the contact with real problem (practice, operational workshops, etc.) as opposed to simulation.

Shifting from traditional literacy to functional literacy with the aim of: (i) integration into the milieu; (ii) control of the milieu; and (iii) transformation of the milieu,

> All projects [of the EWLP] sought to promote participation in the dynamics of the classroom situation. This is not merely similar to what educators call 'active methods'. One of the essential dimensions of participation in fact goes beyond the limits of educational traditions and becomes practical (fields for demonstrating, workshop-classes, etc.). Secondly, the nature of the pedagogical relationship within the classroom must be linked to the participation of the adults in the programme as a whole. The level of educational directivity cannot be separated from the level of initiative of the participants in administering the programme. It is as if two sources of legitimacy or authority constituted the poles of functional methodology: one is the legitimacy derived from technico-scientific competence, the other stems from the forms of social organization of the milieu itself. These two legitimacies may be combined, ...even if it is obvious that authority and directivity are not truly independent, the latter being implied by the former (Unesco, 1976, p. 47).

As for the overall approaches, a turning point in literacy methods was brought about by Paulo Freire through his psychosocial methods advocating a *consciousness-raising* strategy in the form of cultural action (Freire, 1970; Freire, 1976; Hamadache and Martin,1986; Comings and Kahler, 1984; Gee, 1988; Sjöström and Sjöström, 1983; Reuke and Welzel, 1984). The thinking underlying this method, which is extensively referred to and documented, is qualified by Freire as a 'Pedagogy . . . more critical, more investigative, less certain of "uncertainties" . . . This pedagogy is thus more a pedagogy of question than a pedagogy of answer' (Freire and Macedo, 1987, p. 54).

Freire sums up his approach by observing that, in accordance with his basic theses, it was felt essential to go beyond certain classic models and to launch:

> ...a new institution of popular culture, a 'culture circle', since among us a school was a traditionally passive concept. Instead of a teacher, we had a coordinator; instead of lectures, dialogue; instead of pupils, group participants; instead of alienating syllabi, compact programs that were 'broken down' and 'codified' into learning units . . . (Freire, 1974, p. 42).

There is considerable argument about the relative merits of various methods, particularly concerning reading. This controversy is apparently bound to remain unsettled.

3. *Literacy methods in practice*

The evaluation team of the EWLP identified three basic elements of adult-oriented pedagogy, which are summarized by Hamadache and Martin in the following manner:

> The first was an inductive approach to learners' acquisition of knowledge, taking as its starting point the experience, needs and intuitions of adults, the educational process beginning with group discussions designed to identify concerns and problems and to suggest solutions. The second approach takes the form of practical demonstrations, which consist of carrying out work in the field (demonstration plots, experimental stations, fields for actual production, various types of workshop) in application of the pedagogical programme. This is experiential learning or 'learning by doing'. The third element would seem to be that it is advisable to use a variety of methods and techniques. Methodological variety and 'stimulus variation' help to maintain adult interest and attendance: group discussions, self-training, showing of films or slides, problem-posters, puppet shows, field visits, practical demonstrations, individual and collective use of textbooks and reading cards, well-known proverbs and songs, folk tales, etc. (Hamadache and Martin, 1986, p. 111-112).

An illustration of work-orientated functional literacy methods is given in Unesco's critical assessment of the EWLP, as well as in UIE's studies on post-literacy and continuing education. Similar experiences are presented in the country papers prepared for the Unesco Regional Office for Education in Asia and the Pacific on literacy in selected countries of the Asian continent (Unesco, UNDP, 1976; Unesco Regional Office for Education in Asia and the Pacific, 1984; Dave, Ouane, Perera (to 1985) and Ranaweera (from 1986), 1984; 1985; 1986a; 1986b; 1987).

Another observation made at the country level concerns the literacy methods developed under the EWLP. These tend to be named according to the professional sectors served, though the methods hardly differ. Their designation often coincides with the title given to the main primers used as illustrated by the following methods/primers: Opétrab (Opération pour l'éducation des travailleurs du bois) in Congo; tigasène (peanut growing) korisène (cotton growing), sirasène (tobacco growing), cègèmon (fishing), etc., in Mali. The Malian methods were later on grouped into one functional method based on animation and called *An ka dugu* (Our village) (Dave, Perera and Ouane, 1984; Easton, 1983).

Freire presents and discusses the methods that he helped to design and practice in Brazil, Guinea Bissau, etc. This dialogic method is explained by Freire as follows:

> For dialogue to be a method of true knowledge, the knowing subjects must approach reality scientifically in order to seek the dialectical connections which explain the form of reality . . .
>
> To be an act of knowing, then, the adult literacy process must engage the learners in the constant problematizing of their existential situations. This problematizing employs generative words chosen by specialized educators in a preliminary investigation of what we call the minimal linguistic universe of the future learners...
>
> Having chosen seventeen generative words, the next step is to codify seventeen existential situations familiar to the learners. The generative words are then worked into the situations one by one in the order of their increasing phonetic difficulty. As we have already emphasized, these codifications are knowable objects which mediate between the knowing subjects, educator-learners, learner-educators. Their act of knowing is elaborated in the *circulo de cultura* (cultural discussion group), which functions as the theoretical context (Freire, 1985, p. 55-56).

The application of this method for a national literacy campaign in Sao Tome and Principe is further illustrated by Freire and Macedo (1987, p. 65-93).

Bhola, in his review of literacy issues and trends in developing countries concludes his analysis of methods with the following statement:

> ...the soul of the adult education methodology is expressed in phrases such as active learning, experiential learning, independent learning, critical thinking, problem-solving, and learning how to learn so as to exercise full responsibility as learners (Bhola, 1988, p. 113).

(NOTE: Because of the close relationship of their content, and in order to avoid overlap, the bibliographical references for sections 7.3 and 7.4 have been fused into one bibliographical list following section 7.4.)

7.4: Materials and media in literacy

Materials and media are not only viewed in terms of the existing or proposed technological superstructure, or in the context of a particular educational situation or episode, but are also inseparably bound up with the prevailing ideology of development objectives. With this background in mind, materials and media are called upon to give substance to the methods, and to enhance learning and teaching processes, as well as their motivational component.

Their weight has been given so much importance that for a long period the literacy curriculum was limited to the design and production of instructional materials.

1. *The debate on the role of media*

There is a debate on the nature, type and role of materials and media in the overall literacy process. This role should take into consideration a science of teaching adults as recommended by the International Conference on Adult Education held in Paris in 1985. As formulated by Bhola:

> Within such a scientific frame, media and materials of adult education had to invoke active and responsible participation of learners to achieve learning rooted in the people's concrete day-to-day realities. The media and materials had to go to the field and support the practical application of learning in homes, work places and laboratories (Bhola, 1988, p. 122).

The nature of the media and materials used has influenced the discussion about their role. At times the views expressed called attention to the distinctive power, role and decisive contribution of a given material or a type of media on the success of a literacy undertaking (Unesco, 1963; Richards, 1959; Bhola, 1981; Bhola, 1988; Bown and Okedara, 1981; Burnet, 1965; Bown and Tomori, 1980; Fordham, 1980; Ouane, 1984, Carron and Bordia, 1985; Bishop, 1986).

The fascination for media and communication theories has resulted among some commentators in a preference for a particular media, and has led to an exaggeration of their potential contribution to the teaching/learning process. However, as Bhola puts it:

> The fact should be noted . . . that after an impassioned but often blundering love-affair with electronic media, communicators have rediscovered folk media rooted in their own cultural

> traditions, and have unearthed once again the solid virtues of print media. The realization has emerged that no media can substitute for the others. The print media did not and will not by any means render the folk media useless, nor did or will the new electronic media throw print media into the dustbin of history. Each type of media has its own particular set of distributive, control and representational characteristics which must be fully integrated for effective communication (Bhola, 1988, p. 120).

An observation generally made refers to the waves of enthusiasm which spring up from time to time in favour of the use for educational purposes of new inventions in the communications field. Despite the conflicting interests of specialists from various fields taking part in such a discussion, literacy has profited greatly from this debate. As a result, the adult educators' kits have been continuously augmented and their experience enriched by the periodic warnings received and the setbacks experienced and documented in many publications.

The relation between the underlying ideology of a programme and its implications for the types of materials and media used is constantly highlighted. People's fight for power and their visions of the future are said to determine which learning tools are most appropriate.

Tapia Soko provides an explanation of the correspondence between the political orientation of adult education and literacy programmes, and the methodological approach and materials predominantly used (see Chapter VI). The theoretical foundation of what he terms the *cultural tendency* rests on a:

> . . . liberal conception of education and employs a methodological orientation of 'imitation reception' where the textbook constitutes the principle support material. It corresponds to what is presently known as vertical methods, in which there is no opportunity for individual initiative and the core of the process rests on a mechanical transmission of knowledge . . . Contrary to the cultural approach, *the technocratic tendency* to adult education emphasizes a methodology based on a process of training-modernization . . . In this sense, the use of manuals replaced that of texts, even when knowledge transfer continues to be the axis of this process. Participatory levels vary widely, although this ought to be investigated further . . . In general terms, it could be said that the *structural tendency* responds basically to higher levels of organization of popular sectors which tend to seek associative forms and adult education experiences aimed at fundamentally transforming structures of domination. Within this context, the present literacy campaign based on Freire's approach can be cited as an example of this type of approach to nonformal adult education (Tapia Soko, 1980, p. 39-41).

2. *Material, media and forms of expression*

The real impact of literacy is said to emerge only when people have started manipulating and organizing written symbols in order to build alternative images of reality, to reflect critically on their present conditions and their representation, and to explore new avenues for thought and action. The materials and media have to help to perform this complex task.

At the initial literacy level, primers, syllabuses, kits or simple, broadly formulated curricular frames, based on predetermined content areas, constitute the material stock of many literacy projects and programmes. The major components of these curricular frames cover areas such as literacy (mother tongue); numeracy; vocational skills; citizenship training; environmental orientation, etc. These are very often referred to as didactic materials.

As the literacy programmes address themselves to a large group of adult participants, the psychological and certain physiological characteristics of adults call for specific physical devices, ecological tools, culturally bound forms of expression, etc.

The meaning of literacy is broadened to cover not merely alphabets but marks, symbols and notations with which the participants are familiar and which can be put into use (Freire and Macedo, 1987; Rivero, 1989, Bhola, 1988). This approach is illustrated by the *Talking maps project* in Colombia. As reported by Rivero, this project:

> . . . consists of researching and making a series of murals with a methodology which relies on the active participation of the indigenous Paez people. The murals and readers which are produced, apart from illustrating the history of these communities, set out to recreate as far as possible their own world, as seen from within. In this way the people have been enabled to use an educational tool which they could govern to confront dynamically their immediate needs and interests; this tool consisted of a mixture of wall maps and drawings which were discussed and completed by the communities . . .
>
> The mixed form of presentation (drawings and maps) enabled them to set the recently acquired knowledge beside their own of longer date, and to retransmit it. . . . The order in which each mural was drawn is important. Victor D. Bonilla, principal facilitator of the project, reports in this regard:
>
> 'Once we had collected what was known in the communities, documentary evidence and on-site reports, it was time to select and sketch out the scenes for each mural. What was chosen derives from the importance attached to certain facts, details and happenings by both the indigenous people and the researcher. The key point is faithful representation of the largest possible number of details (clothing, plants, persons, etc.), so that what is depicted can be quickly recognized and assimilated, and an atmosphere of reality can be created which invites the community to take it over and extend it (Rivero, 1989, p. 458-459).

As teaching/learning materials and media heavily rely on visual images, central in this discussion is also the concept of visual literacy in the sense of the ability to understand the visual language of pictures and drawings. As Comings and Kahler put it:

> For individuals who grow up seeing images on paper, on TV and in film, visual literacy is a finely developed skill that comes as second nature. People brought up in an environment where pictures and other visual media are non-existent or rare sometimes misinterpret pictures and drawings. Research has shown that even photographs and realistic drawings can be misinterpreted by people from cultures that make use of few graphic or printed illustrations.
>
> A number of factors contribute to misinterpretation of visual images:
>
> - Cultural factors affect the use of visual symbols . . .
> - Size can cause misunderstanding . . .
> - Perspective can be misinterpreted . . .
> - Color can cause confusion (Comings and Kahler, 1984, p. 108-109).

There are, however, indications that, although materials based on print media are the most used, there has been little research into the forms, presentation and type faces that are most suited to new readers and which mirror the way non-readers perceive the world (International Development Research Centre, 1979, p. 98). In this regard attention is generally only given to the size of the letters, which are made bigger for neo-literate adults because of physiological reasons. Differences are also shown in the content. Reflecting on the content of textual materials for neo-literates, UIE's research project on this topic arrives at the conclusion that:

> The usage of complex content is a reflection of attention given to adults whose maturity helps them to cope with such a content and whose needs require that such content be dealt with. It also reflects, however, the propensity which the post-literacy programmes have to aim at adults. . . . Hence, there is a need to find a point of equilibrium, or to provide material which is in conformity with the capacity of adults to learn and understand on the one hand, and with the needs of the young people and the children who join literacy courses in increasingly large numbers, on the other (Dave, Ouane and Perera, 1988, p. 64).

3. *Classifying materials and media*

The literature analysis also reveals the attempts made by a large number of authors to classify the media. The criteria used include, among other things, the mode of communication (traditional media versus print media and/or electronic/modern media); the scale of the media determined rather by their coverage and reach (small media versus big/mass media); the price (low cost versus high cost); the relation to the instructional objectives, etc. (Schramm, 1977, Olson, 1974; Carron and Bordia, 1985; Dave, Ouane and Perera, 1988; Bhola, 1988; Ouane, 1989). From a study in post-literacy conducted in twenty-four countries by the Unesco Institute for Education, a number of learning strategies including materials, media, techniques and resources were identified and grouped into twelve categories. Among them are the following:

1. Newspapers, wall-newspapers, poster and magazines;
2. Textual materials;
3. Supplementary reading materials;
4. Extension literature produced by development agencies such as health departments, agricultural extension services, etc.
5. Libraries, mobile exhibitions, museums;
6. Correspondence courses;
7. Radio, TV, video, films, etc. (modern electronic and audio-visual media);
8. Traditional and folk media;
9. Sports, games and physical culture (Dave, Ouane and Perera, 1988, p. 11-12).

On the basis of regional consultations, the Asian Cultural Centre for Unesco (ACCU) has worked out the following formats for the materials particularly produced for neo-literates:

1. *Printed book* (book, booklets, photonovella, comics, etc.).
2. *Printed non-book* (posters, leaflets/flyers, wall newspapers, news periodicals and journals, flipcharts, picture story-telling hardboard set, cards, etc.);
3. *Electronic media* (films, videos, slides, tapes, radio and TV programmes, etc.);

4. *Games and others* (ordinary conventional games; simulation games; puppet shows, shadow play, folk dance, songs, etc.) (Asian Cultural Centre for Unesco, 1985, p. 28).

Besides the format, the learning objectives have to play a key role in the classification of the material. A distinction is usually made between literacy materials and follow-up materials, the link between the two being made by the supplementary reading materials. Other distinctions made are between graded and non-graded materials, and between development oriented and academically oriented materials.

> The textbooks used for post-literacy in Tanzania constitute a series divided into stages five, six and seven; each stage has eleven books and teacher's guides on the subjects of political education, mathematics, agriculture, Swahili language, health, home economics, handicrafts, history, geography, political economy and English (Mpogolo in Dave, Ouane and Perera, 1985, p. 204).

4. *Materials and media in use*

A large number of publications are devoted to the description and analysis of functional literacy material. An illustration is given in Unesco's critical assessment of the EWLP, as well as in UIE's studies on post-literacy and continuing education. Similar experiences are presented in the country papers prepared for the Unesco Regional Office for Education in Asia and the Pacific in selected countries of the Asian continent (Unesco, 1976; Unesco Regional Office for Education in Asia and the Pacific, 1984; Hamadache and Martin, 1986; Dave, Ouane and Perera, 1984; 1985; 1986a; Dave, Ouane and Ranaweera, 1986b; 1987). In China, for example.

> . . . in Cuixiang county, Shandong Province, the farmers desired to learn the technology of growing an improved variety of Lu Cotton No. 1. A reading primer on the technology of cotton-growing was produced which, in the form of folk songs, describes simply, systematically, and in a spoken voice, from the planting up to the harvest, the links in the cotton production chain, and the guiding principles in technical management. The descriptions are easy to read, and easy to memorize. The booklet . . . not only popularizes the technical know-how of cotton production but arouses the enthusiasm of the farmers in literacy education (Unesco Regional Office for Education in Asia and the Pacific, *Literacy situation... – country studies, China*, p. 23-24).

In the framework of his emancipatory literacy, Freire participated in the implementation of several literacy campaigns, particularly in Portuguese-speaking countries. The materials, says Freire, should be challenging and not patronizing. To show how this was done in Sao Tomé and Principe, Freire discusses and cites parts of the *Exercise workbook* 'Practice to learn', of the literacy phase, and some texts of the *Second popular culture notebook*, of the post-literacy stage.

> The first stage of 'Practice to learn' is comprised of two codifications (photographs); the first, a photo of one of the beautiful coves of Sao Tomé, with a group of young people swimming; the second, a photo of a rural area, with a group of youths working. Next to the picture of the youths swimming is written: 'It is by swimming that one learns to swim.' Next to the picture of the youths working is written: 'It is by working that one learns to work.' And at the bottom of the page: 'By practising, we learn to practise better.'

> . . . Reinforced here is the fundamental idea that one has knowledge to the extent that one reacts by participating in a practise that is social.
>
> The second page of the Workbook reinforces the importance of practise. It reads:
> 'If it is by practicing that one learns to swim,
> If it is by practicing that one learns to work,
> And also if it is by practicing that one learns to read and write,
> Let's practise to learn
> and learn in order to practise better' (p. 69).
>
> The Second Notebook was thought of as the basic book of the first stage of post-literacy (p. 75).
>
> . . . It is not by chance that the first theme dealt with in the Second Popular Culture Notebook is the act of studying . . . It seemed necessary to begin this Notebook by provoking a debate on the act of studying, whose meaning could be learned from the relating of a simple story (p. 76).
>
> . . . To study is to assume a serious and curious attitude in the face of a problem . . .
>
> To study demands discipline. To study is not easy, because to study is to create and recreate and not to repeat what others say.
>
> To study is a revolutionary duty! (p. 77) (Freire and Macedo, 1987, p. 69-77).

In Indonesia, the traditional distinction between literacy and post-literacy materials has been overcome by developing a packet covering the whole continuum and called Kejar Packet A.

> The basic materials of Learning Package A are 100 titles of booklets comprising the titles A1-A20 containing integrated basic lessons in reading, writing, arithmetic and Bahasa Indonesia . . .
>
> The series A21-A60 is a continuation of A1-A20 and contains additional information on basic knowledge and skills concerning aspects of life . . .
>
> The series A61-A100 (the upper roof of the letter T) contains information on knowledge and skills concerning aspects of life which are wider in scope . . . (Unesco Regional Office for Education in Asia and the Pacific, *Literacy situation...- country studies: Indonesia*, 22-23).

The first three series of this packet are taught through the analytic-synthetic and synthesis method which is reinforced by drill exercises to accelerate the learning process. The design of this package provides room for various ways of studying by different participants. A series of non-written materials such as tape cassettes, drawings, etc., are attached to the packet in order to help to involve illiterate adults (Unesco Regional Office for Education in Asia and the Pacific, *Literacy situation... country studies: Indonesia*; 1984; Iskandar, Sihombing et al. in Dave, Ouane and Perera, 1986).

One of the basic problems involved in the process of bringing people to literacy is the production, acquisition and proper utilization of material. Practitioners and researchers are drawing attention to this because of the need to render literacy skills permanent. This is particularly highlighted at the post-literacy stage. Reading materials for neo-literates has long been considered as the supreme weapon against relapse into illiteracy. The efforts undertaken are unequally spread, and the needs for materials are far from satisfied. A prominent place is given in this material to traditional oral literature, the collection, transcription and dissemination of which has largely been accomplished by systematic research studies in India, Mali, the United Republic of Tanzania, etc. (Malya, 1976; Ouane, 1984; Sharma in Dave, Ouane and Perera, *Learning strategies... in China*, 1986).

In a large number of countries, the rural or community press has been charged with the mission to act as an institution aimed at feeding neo-literates with reading materials while consolidating in certain societies the newly established linguistic norms and providing awareness for the promotion, and 'modernization' and 'technologizing' of the local languages. The rural papers contribute to spreading written messages in these hitherto predominantly oral societies; they provide space for neo-literates to exercise their writing skills in publishing articles, and in raising questions to their leaders and to other members of the society; they are often attached to discussion groups, reading clubs, etc., aiming chiefly at spreading developmental and societal messages requiring literacy-based action. The experiences are very rich in this respect. Some of the rural newspaper such as *Kibaru* in Mali, *Elimu haina mwisho* in the United Republic of Tanzania; *Let's read* in Jamaica; *Campesino* in Colombia, *Gangaa* in Niger and *Game su* in Togo are known internationally. Their patterns, structures, content, functioning and modalities of evaluation have been studied and frequently referred to (Ouane, 1982; 1984 and 1989; Dave, Ouane and Perera, 1984, 1985; *Learning strategies . . . China*, 1986; Dave, Ouane and Ranaweera, *Learning strategies . . .*, 1986; Brazil 1987).

From its inception Unesco has articulated the need to write books for new literates. It has been stressed that the material should be specially designed and written, that participants should be involved; and that a multi-media co-operation should be initiated (Unesco, 1963; Richards, 1959). The Unesco Regional Offices, especially in Latin America and in Asia and the Pacific have organized a series of conceptual meetings and operational workshops on this subject. Similar undertakings have been made in Africa and the Arab States (Regional Workshop . . ., 1983; 1985; 1986; 1987). Out of these country experiences has grown a culture of workshops for the production of easy-to-read material with a do-it-yourself content. (The various schemes are analysed in Ouane, 1989). Bhola has developed a model of social writing from his involvement in the design and implementation of a series of writers' workshops in Africa (Bhola, 1989).

In order to provide easier access to these materials, countries and programmes have developed a variety of supporting structures to sustain and promote this task, such as libraries, exhibitions, mobile museums, fairs, etc. These structures are intended to help the greatest number of people to draw the fullest possible benefit from materials through devices such as listening groups/clubs, study circles, action groups, etc.

The use of radio for literacy is well documented, and opinions diverge strongly about the merits of this medium. Research has shown that for educational purposes, radio can be used as:

- a channel for transmitting information (including items with specific literacy content) to a given target population; and
- a means of establishing dialogue between literacy providers and other participants with the aims of: (a) [stimulating discussion] among themselves, and/or using information supplied by the organization; and (b) sharpening their ability to assimilate the information given and to analyse, interpret and re-invest it in terms of their own social and environmental needs. These media are used: to motivate; to inform; to teach; and to change behaviour.

In a reader prepared for the workshop series of the German Foundation for International Development (DSE), Müller presents a round-up of experiences, discussing their developmental and educational context and their literacy component, and highlighting the main strategies adopted, namely: open broadcasting; radio campaigns; regular listening groups in the form of radio schools, radio forums and radio animation groups; and the telecommunication use of radio (Müller, 1985, p. 7-11).

The impact attributable to the use of modern media in the success of literacy is difficult to assess. Reports of experiences have concentrated on the motivational function of these media and their use in distance education, particularly in teacher training. However, it is generally admitted that their impact increases drastically when they support each other, and are used in conjunction with other media. The experience of the Acción Cultural Popular (ACPO, Action for Popular Culture) in Colombia is frequently referred to as illustrative of such a tendency. The multi-media package of ACPO includes radiophonic schools, a weekly newspaper *El Campesino*, printed booklets, a farmers' library, recordings, campaigns, correspondence courses, and a training institute for leaders.

As far as traditional media are concerned, their enormous potential receives widespread endorsement, but most of the cases described are confined to the motivational function of these media. There is now a reasonable amount of documentation on the role of the popular media and their use as major channels of communication: (a) to increase the awareness of communities at the grassroots level; (b) to encourage these communities to change their attitudes towards certain innovations; and (c) to contribute actively and on their own initiative to the search for original and viable solutions to problems (Kidd and Colletta, 1980; Unesco, 1982; Evans, 1979; Bappa, 1981; Dave, Ouane and Perera, 1988). Attention has been drawn to the conservative nature of these media, which tend to advocate adjustment to the existing social norms of the ruling elites.

Analysing the prevalent practice in the use of media and materials for literacy and adult education, Bhola arrives at the conclusion that:

> Technology has made it possible for adult education to be delivered 'at a distance' through television, radio and the telephone. Adult educators have gone to the field with a hand-held video camera to bring the realities of daily life to the office suites of decision makers. While this technology has been used, the good old cartoon films have not been forgotten.
>
> Questions of 'unequal relationships' of listeners and viewers with media and materials, and of media control have also attracted the attention of practitioners. The media and materials produced by the technically trained are so slick and powerful that they overwhelm the receiver of the message. There is, therefore, a strong concern being expressed about the need to teach critical appreciation of the media. A new role for the media practitioner is emerging wherein the adult educator should stand between the learner and the television, film or press, and help adults select, combine and adapt media and materials to their genuine needs (Bhola, 1988, p. 128-129).

Note: The Unesco Institute for Education holds an extensive collection (more than 6,000 items) of a variety of sample learning materials used in literacy and post-literacy, including, for example, posters, rural newspapers, games, video- and audio-cassettes, films, textbooks, supplementary reading materials, evaluation instruments and teacher manuals – covering a wide range of topics from daily life situations via vocational skills to creative literature from more than 100 developing and developed countries in about 150 languages.

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7.5: The training of literacy personnel

There is widespread agreement that training is a central operation in any literacy undertaking. Training has to be a guaranteed component, not only in the form of 'pre-service' initial action before launching a programme, but also 'in-service' during implementation. It should be continuous and backed by 'refresher sessions', leading to self-training. Significance is also given to the role of the trainer:

> The trainer is the primary developer of human resources, but he performs this role the best when he helps people to assist themselves and each other . . . The most desirable characteristic of a trainer is that of 'empathetic understanding' (Rogers, 1961, quoted in Unesco Regional Office for Education in Asia and the Pacific, 1987, p. 62).

Notwithstanding its crucial role, experience has shown that the training of personnel has generally been a neglected aspect in literacy, thus adversely affecting the quality of the programmes. Training has been carried out in most countries in an ad hoc, non-systematic manner to implement new programmes or keep the personnel updated as policies and programmes evolve (Unesco, *The training . . .*, 1972; Lizarzabaru, 1985; Bordia and Carron, 1982; Ouane, 1984; Unesco Regional Office for Education in Asia and the Pacific, 1987).

The experiences gained through such practices give rise to conflicting views about the benefits to be derived from training.

> [Of course] not everyone agrees with such a cheery prognosis. Indeed, in the absence of solid evidence, some people suspect that training has little positive impact on the field, especially when linked to credentialling and professionalization. Many workers maintain that no one

> should be denied an opportunity to practise adult education because of a lack of training. The 'gifted amateur', the mainstay of adult education, should be encouraged. Indeed, some say the best adult educators are those who have never seen the inside of a teachers' training college or university faculty of education (Boshier, 1985, p.4-5).

What is training?

Training and education overlap. Both are concerned with learning and teaching, but a distinction is made between them. Theoretically speaking, education teaches higher values and deeper understanding. Training, on the other hand, is seen as instruction in procedures and the transfer of skills. It is viewed as having a specific and even narrow focus – involving a mix of discipline and drill (Bhola, 1989). According to Stock:

> Strictly speaking the notion of training implies designed instruction and learning experiences to ensure competent performance in a designated operational role. However, the complex business of education – especially for adults – makes it difficult to predetermine all the role requirements and necessary behaviours in every circumstance which an adult educator may encounter (Stock, 1987, p. 218).

In this context, it is interesting to draw attention to the specific definitions Nadler has for training, education and development while formulating his well-known 'critical events model' (CEM):

- Training-learning related to the present job of the individual.
- Education-learning related to a future but defined job for which the individual is being prepared.
- Development-learning for the general growth of the individual and for the organization (Nadler, 1982, p. 7 quoted in Langenbach, 1988, p. 34).

As an educational process, training involves the acquisition of knowledge, awareness, attitudes and skills related to the roles and tasks of the adult educators and literacy workers. As for learning, training is also about change; the process of training is how these changes are brought about and its outcomes are the consequences of such training. According to Unesco:

> Training programmes, if well designed and carried out, provide participants with new skills or knowledge related to their professional responsibilities. If the training programme is effective, that is, if the participants acquire new and relevant skills, that effectiveness will be translated to the work environment (Unesco Regional Office for Education in Asia and the Pacific, 1987, p. 1).

The literature survey on this topic, reveals the fact that there exist general guidelines and statements of intent about the structures, objectives and content of training courses, but little understanding and much divergence on the central issue concerning the complex process of how to teach individual learners. There appears to be little consensus on the theoretical underpinnings of the training of literacy workers. There is a lack of agreement about the solutions to many of the basic questions in the training field, especially in the analysis and evaluation of 'good literacy teaching'. Models have been devised and attempts made to generalize and transfer or adapt them into varying milieus (e.g. Unesco's operational seminar; the action training model (ATM) developed by Bhola under the aegis of the German Foundation for International Development; basic learning modules, etc.). Even in such cases, there remains much uncertainty as to how teachers best acquire and develop a set of skills and attitudes consonant with such models (de Clerck, 1976; Bonanni, 1982; Planning Meeting . . ., 1982).

Much attention is devoted in the literature to the characteristics, role and function, motives and aspirations of literacy teachers; the perception of trainers and trainees about the training programme; their interrelation and their attitudes and opinions about the training process and its subsequent effect. A number of studies aimed at uncovering and illuminating these facts have addressed themselves to a range of questions on areas including the conceptual and operational framework for training, policy and provision, course objectives, organization and management, and curricular issues with a focus on content, methods and evaluation. There has been a plethora of national and international reports of conferences and seminars concerned with the training of literacy personnel, but few systematic studies of training concepts and processes (Graham et al., 1982; Stanley, *Guide to training need assessment*, 1987; Langenbach, 1988; Comings and Kahler, 1984; Fordham, 1980; Bonanni, 1982; Duke, 1985; Unesco, 1983; Boshier, *Training* . . ., 1985).

Types, forms, modalities of training - some training experiences

If training is to be effective in preparing the knowledgeable, committed and skilled personnel required to promote and carry out literacy programmes in developing countries, there is a need for a structured approach in developing the training programmes. Opinions diverge as to how to design such a structure. Certain broad paradigms, such as a systems approach, have been proposed for the design of models, and other heuristic devices put forward to help identify needs, categorize trainees and determine content, as well as the processes and outcomes of training.

The training of personnel in literacy is not a neutral undertaking. Its educational thrust should be regarded in a historical and socio-political context; for this reason the ideological underpinnings of the programme concerned must be understood and highlighted in the training process. International organizations such as Unesco, UNICEF, ILO, etc., have promoted and disseminated their own training schemes and assisted States and institutions in formulating training concepts. Additionally, eminent educators such as Gandhi, Nyerere, Freire and others have made significant contributions to the theory and practice in this field (Unesco, *The training* . . ., 1973; Unesco Regional Office for Education in Asia and the Pacific, 1987; India, Directorate of Adult Education, 1987; Lizarzaburu, 1985; Consulta Tecnica Regional . . ., Caracas, 1986; Bonanni, 1982; Stanley, *Guide to training curriculum development*, 1987; Langenbach, 1988; Duke, 1985; Hamadache and Martin, 1986).

Philosophies, ideologies and theories of varying origins and vision have influenced thinking in this direction. Some of them are socio-economic, socio-political and cultural, others are educational in nature. The broad conceptual approaches rooted in ideology determining and conditioning all literacy operations are dealt with in Chapter VI of the present bibliography. Educational theories are touched upon while defining and conceptualizing literacy, and literacy and its relation to orality and development is also dealt with.

It is interesting to note how training is subjected to the underlying ideology and resulting educational theories. The designations given to the person in charge of promoting literacy learning give indications of the philosophical flavour of the programme. Certain programmes use terms deriving from classical pedagogy such as instructor, teacher, educator, supervisor, etc.; other countries opted to reflect the intended change in the functions of this category of personnel by using designations from social pedagogy such as facilitator, animator, mediator, volunteer, etc. Countries from the latter category very often use unpaid workers, but it is not rare that paid literacy teachers are also called literacy volunteers. In the literature concerning training, reference is often made to learning theories. This is not only in relation to how the trainee learns, but also concerns ways to stimulate and secure learning by literacy participants of different ages and from different socio-economic backgrounds and conditions. Classical schools of educational psychology provide the foundation for most of these learning theories. Since Knowles' *Andragogy*, adult learning is viewed from a new perspective and with a fresh focus (Unesco, *Practical* . . ., 1973; Unesco Regional Office for Education in Asia and the Pacific, 1987; Lizarzaburu, 1985; Knowles, 1984). While studying continuing education characteristics, Houle opted for a more dynamic theory dividing professional settings into 'three major and overlapping modes of learning', viz., inquiry, instruction and performance (Houle, 1984, p. 31-32).

Lizarzaburu considers that due consideration should be paid to the following relevant factors in the *Training of basic promoters of literacy*:

- The existing social reality/realities;
- The institution in charge of education according to its reading of the social reality;
- The educational practice;
- The functions of the promoters (Lizarzaburu, 1985).

Certain fundamental principles have been found to be essential in training methodology and are repeatedly mentioned in the literature:

> For purposes of functional literacy work, the usual training methods are unsatisfactory because they generally place great emphasis on teaching formulas and conveying knowledge by means of lessons, lectures and so on, whereas in reality the only real knowledge is that which is acquired by experience, in a real situation, and by methods combining, within the act of learning, practical activities and the theoretical elucidation of those activities (Unesco, *The training* . . ., 1973, p. 9).

Other principles mentioned are: the principle of totality encompassing different stages and structures; the principle of participation; the principle of multidisciplinarity and multisectionality; the principle of integration; the principle of diversification; the principle of regulation (Unesco, *Practical* . . ., 1973; Lizarzaburu, 1985; Unesco Regional Office for Education in Asia and the Pacific, 1987; Dave, Ouane and Perera, 1988; India, Directorate of Adult Education, 1987).

Freire set forth basic premises for working with adults that remain as challenges to adult educators everywhere. The team approach is considered by Freire as an act of cultural synthesis, as opposed to cultural invasion.

> In cultural synthesis, the actors who come from 'another world' to the world of the people do so not as invaders. They do not come to *teach* or *transmit* or to *give* anything, but rather to learn, with the people about the people's world (1970, p. 181 quoted in Langenbach, 1988, p. 99).

Training has been conceptualized and, particularly, operationalized in differing manners. This is lauded by some who see only richness in such an extended range of approaches and practices, while others find this to be a sign of weakness and lack of perspective.

In the literature on training there is no consensus on differentiating a strategy from a method, or even in defining a general approach. The general approach, such as participatory training or experimental learning is sometimes viewed as a strategy; some authors may present as a strategy or method the complex individual or group processes involved in a general approach (e.g. information processing, decision-making, problem solving, resolution of conflicts). Some strategies, such as structured experience, combine perception, cognition, attitudes and behaviours and thus influence the different types of learning pursued in an interrelated manner.

The tutorial guidance needed for independent learning, especially when distance education is the mode of training, may also be presented as a general strategy. Others having a broad scope are project work, field visits and team work. In Unesco's *Guidebook for the training of organizers* these terms are understood as follows:

> *Training process*: . . . usually used to describe the overall series of training activities involved in a training programme. The process is the 'how' of a training experience. Research into the way people learn shows that, generally speaking, adults and children learn best when they are actively involved in an experiential process that moves from having an experience (for example, giving a demonstration to rural farmers of how to spray a pesticide) to discussing the experience (following the experience the demonstration trainers discuss the experience, each sharing his or her own views), to summarizing the experience (the experiences are then summarized into generalizations about the experience, i.e. 'when talking with farmers it is best to use terminology they are already familiar with'). The process then moves from generalization to application . . . The actual application becomes the new experience and the 'process' is repeated from experience to discussion, to summary, to generalization, to application.
>
> *Strategy*: The general type of training approach to be adopted for each session, e.g. lecturing, small group work or a practical workshop.
>
> *Method*: The precise activity involved in a strategy. For example, if a small group strategy is being used, methods might include discussion, role play or answering a quiz in a small group (Unesco Regional Office for Education in Asia and the Pacific, 1987, p. 79-80).

In another context, Shrivastava, while providing the ideological base for defining a participatory research approach to training, observes that it does not remain a technique. It goes beyond a method because the underlying concepts of 'participation and control', 'awareness and empowerment' plus preparation for 'mobilisation and organisation-building' remain part of the process (Shrivastava, 1989, p. 11-12).

Several authors are of the opinion that pre-training and post-training deserve more attention than they have received so far, compared to the 'during training' component of the overall training design. Pre-planning and determination of needs; specification of aims and objectives; selection and sequencing of content; determination of strategies; methods, group organization, allocation of time and space, selection of resources and materials, etc., are part of the pre-training activities, while follow-up and evaluation of overall training effectiveness are the major elements of post-training activities.

A myriad of scales and schemes have been devised to tackle each of the aspects mentioned in the three phases of training, very often backed up with diagrams, some of which are neither readable nor usable.

The literature shows that the training of trainers is regarded as of great importance, and benefits from institutional arrangements in most countries. A preferred concept used for full-time literacy and adult educators is 'staff development', which implies an expectation of continuing growth in personal and professional skills, knowledge, experience and capacity.

As the non-institutional training of grassroot personnel unquestionably features among the priority objectives of action at national and international levels, Unesco has formulated and spread a comprehensive approach to training, namely the 'field operational seminar', already referred to, which gave inspiration to many programmes in conceptualizing their own training design not only for this kind of personnel but also for other categories of literacy workers.

> The operational seminar is not exclusively designed for literacy teachers; it is also intended for all those, specialists and other cadres, participating in the literacy programme . . . The exercise covers only part of the teaching programme and only a fraction of the educational calendar, but it is nonetheless global in the sense that it covers all the phases prior to arrival in and subsequent to departure from a given area . . . (Hamadache and Martin, 1986, p. 122; de Clerck, 1976).

A more comprehensive approach based on action-research and taking inspiration from popular education is being developed and implemented in Latin America under the aegis of REDALF (Network for Training of Personnel and Specific Support for Literacy and Adult Education in Latin America and the Caribbean) which operates in four main directions:

(a) training and further education of the training personnel;
(b) innovations in learning processes and strategies;
(c) physical facilities and learning materials;
(d) socio-educational research. (Consulta Técnica Regional . . ., Caracas, 1986).

A similar network is being developed in Asia on the three main areas covered by APPEAL (Asia and the Pacific Programme of Education for All), namely primary education, literacy and continuing education.

Major issues in training

The importance of training has been largely acknowledged, but there remain other issues to which much space is devoted in the literature.

> . . . Training . . . tends to be crisis-oriented – always having to face time pressures which encourage a tendency to short circuit the design and development phase of the training process. Under such circumstances, the trainer must treat events as contingencies and rely on experience, marshall as much support as possible, and apply formative elements in the monitoring processes while the training is being implemented (Stanley, *Guide to training curriculum development*, 1987, p.36).

Opinions are divided about the benefits that could be derived from literacy personnel training, while attitudes towards such training show distinctions not only in relation to the basic conceptual principles already referred to, but also concerning certain characteristics and properties of training and of the literacy programmes providing such training (see, for example, Unesco, 1983, p. 56).

The observation cited above summarizes the major issues being faced in training literacy personnel in developing countries: amateurism, voluntarism, the search for a multiplier effect, etc. A lack of institutionalization and of a systematic training system (discipline) are the two main deficiencies the literacy training programmes are suffering from in many countries. According to Houle professionalization and not a static professionalism should be the goal of continued learning in any profession.

> Every occupation that is called a profession is, in reality, a semiprofession . . . A dynamic concept of professionalization offers educators both the opportunity and the challenge to use active principles of learning to help achieve the basic aims of the group with which they work (Houle, 1980, p. 28 and 30 quoted in Langenbach, 1988, p. 111).

Furthermore, Houle defines fourteen essential characteristics of professionalization which have been found to be applicable to literacy training if such a profession is to be institutionalized (Houle, 1980).

The search for a multiplier effect is generally translated into the adoption of the modality of 'each level trains the personnel at the lower level'. As stated by Unesco's Principal Regional Office for in Asia and the Pacific, the modalities of action of APPEAL (Asia and the Pacific Programme of Education for All) include:

> Arranging training activities for key personnel who in turn will train more personnel at national, sub-national and local levels related with different action areas (Unesco Principal Regional Office for Asia and the Pacific, 1987, p. 5).

This approach, which is often the only one used, has yielded considerable results in solving the immediate need of the training programme, but what comes out of this 'assembly line' as a final product may not conform to the expectations of the programme objectives. This is metaphorically expressed by Ouane in his analysis of literacy training experiences in Francophone Africa:

> Training is like a cascade where each step passes a part of the skills acquired to the next step down, sometimes automatically, and which is intended to be essentially methodological. If the performance of organizers who set up this framework of downward movement (and they are usually technically competent) can be compared somewhat audaciously and with much exaggeration to an interpretation of a Beethoven symphony by Karajan, it is obvious that numerous other conductors with different skills can reduce this symphony to a performance by the national guard (Ouane, 1984, p. 344. Original French. Our translation).

It may be pointed out that, in view of the magnitude and geographical range of the struggle to be waged against illiteracy, no other solution is possible than searching for a multiplier effect and soliciting also the voluntary services of non-professional, unpaid workers to help to further the cause of literacy based on a spirit of generosity and human fellowship (Unesco, 1983, p. 59).

Summarizing his article on the *Training of adult educators*, Stock's observation reflects the widely-held view regarding the issues faced by training in the field of literacy and adult education.

Modern training for adult educators has taken a great leap forward in recent years, but still needs to evolve further. Evaluation procedures are still not applied as rigorously as might be expected, nor used in re-design activities as would clearly be helpful. More recent 'systems' approaches may tend to correct this, but care must be taken to avoid the trend towards inflexibility and abstraction which can sometimes arise in over-dogmatic systems application.

All training procedures should exemplify the best field practice. Trainers should use methods and techniques themselves which they would expect trainees to apply in the classroom, workshop or community group.

Affective learning is just as important as cognitive for trainee adult educators. Tolerance, confidence, warmth, enthusiasm and sensitivity are important attributes which can be learned, if they are not spontaneously evident.

Much individual growth – in personality, judgement, interests and knowledge – should be looked for in trainees as well as purely performance skills (Stock, 1987, p. 225).

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7.6: Evaluation

> In a large number of African countries, although the rate of illiteracy is declining, the number of illiterates is increasing. This fact can be largely explained by the relatively low capacity of the educational system compared with the demographic growth . . . The growing mass of illiterates can also be explained by the poor educational yield and by the weakness of the resources made available for adult education (Vaugrante, 1970, p. 6).

This statement, found in one of the early evaluation reports on illiteracy in Africa, could very well have found a place in the various articles written during recent months in the context of International Literacy Year – twenty years later.

Indeed, evaluation is not a new feature in this field. During the last two decades, evaluation has become more and more a part of the process, as is witnessed by the significant literature that is now available on this subject. Yet much remains to be done in the area of literacy evaluation in order to help decision makers, researchers and literacy workers, not forgetting the target populations involved, to solve the problems confronting them.

Evaluation in the field of literacy has benefited greatly from the development of evaluation in other fields, including education. The bibliography on literacy evaluation needs therefore to refer to such key publications from authors who have made significant contributions to the development of evaluation in general (Rossi, Freeman, Wright, 1979; Bloom, Madaus, Hastings, 1981; Berk, 1981; Madaus, Scriven, Stufflebeam, 1983; Das et al., 1984; House, 1986).

The most important, and still one of the most significant pieces of work in literacy evaluation, is certainly the Unesco Evaluation Report of the Unesco-UNDP Experimental World Literacy Programme (EWLP), besides articles and critical analysis of the different evaluation studies of the functional literacy pilot projects implemented in various developing countries from 1967 to 1972 (Unesco; UNDP, 1976). On the basis of the trends that emerge from the data gathered, the authors were able to conclude that the programmes had had a positive effect on the individual and were also a factor in social change. Nevertheless, this report stresses significant limits in the evaluation studies on which they had to rely; a criticism also valid, unfortunately, for many of the evaluation studies that have been published since then. These critical assessments of the evaluation practices drew attention to, for example, the use of too narrowly defined criteria to lay over-emphasis on quantitative data, on imprecise goals for evaluation and on 'inconclusive' conclusions.

Since then, literacy evaluation has become a diversified field of studies and practice (Lind, 1989): research-oriented evaluation studies; internal project- or programme-related evaluation; assessments and measures of illiteracy rate; monitoring, evaluation, design and planning. The 'total systems approach', described by Bhola (1988, p. 154), consists of themes and issues such as: needs assessment; baseline surveys; personnel evaluations; achievement and attitude testing; curriculum evaluation; institutional and organizational evaluation; product evaluation; impact evaluation; cost/effectiveness evaluation; and self-evaluation adopted today by evaluators.

One of the most recent and most rigorous research orientation evaluation studies of adult literacy has been carried out in Kenya (Carron, Mwiria, Righa, 1989). The interest of that study lies not only in the fact that the authors have measured the acquisition of literacy skills as well as the transfer or use of those skills in daily lives, but also that they have made a thorough analysis of the educational processes that were conducive to these results in five different communities. And through this comparative analysis of the different regional contexts, this study is throwing new light on the effect of the environment on such educational intervention. Using passages based on criterion-referenced evaluation, rather than normative, this study concludes that more than 70% of the participants were able at the end to show a satisfactory mastery of writing, reading and numeracy skills. Unfortunately, this research stops short of analysing the impact of such a literacy programme on the development of the community in the fields of health, nutrition, housing, etc.

Other scientific evaluation studies of national literacy programmes have been published (Easton, 1984; Lind, 1986; Munoz Izquierdo, 1985). The study by Lind in Mozambique is a good example of an *a posteriori* scientific diagnosis of a programme that has shown limited results. These studies were based on interviews and questionnaires administered to national, regional and local literacy workers and administrators.

The complex and costly procedures needed to undertake such research-oriented evaluation studies are not available to most practitioners in the field. For the purpose of realization of internal project-related evaluation, guides and materials are now available (Grotelueschen, Gooler, Knox, 1976; Couvert, 1979; Bhola, 1989; Müller and Dietrich, 1989). The present bibliography includes many reports of such internal evaluations in India, where the evaluation of literacy projects under the national adult education programme is becoming a traditional practice (All India Seminar, 1979; Rao, Bhatt, Rao, 1980; Shah, 1983; Visaria, 1984), in Africa (Lesotho Distance Teaching Centre, 1979; Ziegahn, 1985; Bown, Okedara, 1981; Lasway, 1985), in Latin America (Centro de Capacitacion . . ., 1986; Consulta Técnica Regional, 1988; Dimensión Educativa, 1985; Unesco Regional Office for Education in Latin America and the Caribbean, Regional Centre for Adult Education and Functional Literacy for Latin America, 1988). An Indonesian study illustrates the application of the criterion-sampling approach to the evaluation of basic literacy programmes (Shavelson, 1985, p. 73-106).

The assessment and measure of literacy rate has also been the object of significant progress since the 1970s. Efforts have been made in Africa (Okedara, 1981) and in Asia (Philippines, 1987) to produce a more discriminating and precise assessment of the situation at a national level by validating the traditional statistics on formal schooling by a census, which included specific questions on the different members of households, and more recently by using literacy tests administered to a sample of the adult population. From such studies we are now able to distinguish between literates, semi-literates and illiterates, and to assess what we may call the take-off point in the retention of literacy. Such a point refers to the duration of schooling needed in order not to lapse back into a situation of semi-literacy.

Another field of recent development in literacy evaluation is monitoring, the systematization of a continuous feedback information process on the state of implementation in a programme to decision makers and (although less frequently) to the community. The organization of such a systematic flow of data routinely generated by a programme about its input, its process and its output is a complex task in adult literacy and non-formal education. The decentralization of those programmes, their flexibility, their relation to local needs and hence the variation of the curriculum and the geographical dispersion of activities are variables that made the traditional formal school monitoring system dysfunctional for informal education. The most important experience in this field is certainly the one organized through the National Adult Education Programme of India (All India Seminar, 1979; Rao, Bhatt, Rao, 1980; Mathur, 1988). The Management Information System (MIS) has been referred to as a possible model for that purpose (Bhola, 1989). Monitoring is not an entirely new phenomenon since it has been practised before in developing countries in other fields, like agriculture (Casley, Kumar, 1988). Of course, monitoring is not evaluation but it produces an important data base for further evaluation and, as such, is becoming an important agency in evaluation.

Another field of studies in evaluation, and an important one for practitioners, is what is being called 'evaluation design and planning'. Frameworks have been developed to help establish evaluation as a built-in element of the educational process (Dave, 1980 and 1985), and this at all stages of the implementation of a programme. The selection of procedures and techniques to suit a programme and to answer the needs of the people involved is a key decision (Cronbach, Shapiro, 1982 and Bhola, 1989).

The present literature on literacy evaluation raises some issues. The first one is the comparative analysis of literacy campaigns and regular literacy programmes (Bhola, 1984; Arnove and Graff, 1987). Another issue is participation – or rather the relative absence of participation – in the evaluation process. The participatory dimension of evaluation is not only an ethical matter required by a democratic process, it is also a matter of efficiency in order to respond to real needs. A programme needs to have a built-in communication process so as to produce a continuous feedback from the targeted population to the decision makers helping them to regulate the system. But if evaluation needs to be participatory, it is because assessment of one's own achievement is also a learning process, and that is what self-evaluation (FAO, 1985) is all about. The media is the message, and the participatory quality of an evaluation process cannot but reveal the perception that the programme administrators have on the importance they are giving to people's reactions and the assessments of their needs.

The present literature on literacy evaluation indicates another gap, namely the absence of research and practice on the evaluation of endurable learning achievement for accreditation. More and more new literates need such credentials either to make a transition from informal to formal educational systems, or to occupy a work post as a wage earner in urban areas. If practitioners are to meet this growing need, they require new procedures which are inexpensive yet rigorous. These are still to be developed.

Another weakness in the present state of development of literacy evaluation is certainly evaluating the impact of such programmes; that is, assessing the effects of the acquisition of literacy skills on the life of the individual and the community as a whole. We need to enlarge the scope of literacy to be able to assess the larger and social impact of the immediate effects of literacy projects; impacts, for example, on agricultural productivity, on changing nutritional patterns, on health, on the uses of literacy in the changing local culture.

Referring to the methodological debate, Bhola stresses the need for a shift from a positivistic paradigm to a naturalistic paradigm in evaluation, and invites educators 'to study human nature by using naturalistic methodologies of inquiry which are, indeed, the most appropriate methodologies of choice' (Bhola, 1988, p. 155). Adopting this principle, Kassam, in his study on the impact of the Tanzanian literacy campaign, uses the 'anthropocentric approach and the dialogue method', in contrast to the usual highly technical and mechanical types of evaluation concerned mainly with the quantitative and socio-economic impact in terms of the personal and qualitative effects of literacy:

> In the light of the more liberating, humanistic and man-centred goals of literacy, and in view of the fact that the process of adult literacy is an intensely emotional experience, I believe that by far the most significant and profound impact of literacy on the people can be found in the personal and qualitative realm of people's own thinking, their own feelings, their own vision and their own perceptions about the changes that may have occurred in themselves and in their situation.
>
> The investigation of such personal and qualitative changes in the people can best be illuminated by adopting an 'anthropocentric' approach which involves the interpretation of reality exclusively in terms of human values and human experience . . . The anthropocentric approach is qualitative and humanistic, and epistemologically, it helps to make a more accurate reflection of social reality, for who would know best where and how the shoe pinches if not the wearer himself? (Kassam, 1977, p. 10).

Finally, the predictionistic effect of some methodological choices has to be mentioned. We refer here to the possible negative impact of the choice of evaluation tools on the programme. The fact that it is easier to measure narrowly defined learning objectives may lead to a corresponding reduction of the curriculum as such, or certainly of the real teaching. The generalization of numeracy and literacy skills tests for evaluation may have the effect in the long run of limiting the scope and hence the cultural, economic and social impact of literacy programmes.

An interesting experience in that regard is the one reported in French-speaking Africa to measure the effect of literacy programmes in Mali (Easton, 1984). The methodological originality of this project was the refusal to rely on a single measure to assess the effect of the programme, but rather to diversify the collection of data to make a comparative analysis of those different data and to assess the accumulation of convergent results as valid indicators of the effect of the programme. Although complex and sophisticated, this experience demonstrates important features for evaluation development: first, the paramount importance of clear, precise and operational definitions of the objects of evaluation; and secondly, the desirability and possibility of authorization of different complementary qualitative data for the assessment of results. Such an orientation makes possible the evaluation of the real and large objectives of a project, as well as the interpretation of results, by taking into account the different social and cultural variables involved (Dominicé, 1979).

Evaluation is not the panacea of all the problems raised by the immense task of literacy. Nevertheless, there will be no efficient solutions implemented without proper evaluation, and one should hope that more research and more experimentation will be carried out in this field so that, at the end of the present decade, the opening statement of this chapter will not remain valid – thirty years later!

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VIII. CHALLENGES AND PROMISES

Unesco had set the end of this millennium as the time target for the eradication of illiteracy. With ten years to go, it is a fact that in spite of all the hard work and thinking, idealism and financial resources invested, the absolute number of illiterates in the world is higher than it was when Unesco attributed this phenomenon its highest priority about forty years ago. Learning from successful as well as unsuccessful experiences, shifting and re-shifting concepts and ideologies, trying out of different approaches, making use of the evolving new technologies, and opening up financial resources – we have been able to decrease the percentage of illiterates but could not keep pace with the population explosion. Exceptions are the drastic – although, due to the absence of post-literacy infrastructures, vulnerable – declines in illiteracy rates achieved mainly in such countries as Cuba, Ethiopia, Nicaragua and the United Republic of Tanzania and Ethiopia where literacy campaigns were linked with revolutionary mass movements. What went wrong? A study of the literature suggests, among others, a combination of the following causalities:

1. The perception (societal and individual) of illiteracy was limited in concept and range.
2. The hidden motive often underlying political commitment was to introduce literacy for domestication and not for liberation.
3. Literacy skills taught at the formal school level were conceived to perpetuate existing systems.
4. The illiterates were indifferent and/or resistant to what they saw as indoctrination through one-way communication of either western values and knowledge or their own countries' elitist thinking, neither of which would necessarily lead to any improvement in their life situation.

Linked to the above are Galtung's provoking reflections put forward at the Persepolis conference:

> What would happen, if the whole world would become literate? Answer: not so very much, for the world is by and large structured in such a way that it is capable of absorbing the impact. But if the whole world consisted of literate, autonomous, critical, constructive people, capable of translating ideas into action, individually or collectively – the world would change (Galtung, 1975, p. 1).

Consequently, literacy viewed not from a narrow traditional educational angle but placing it within the wider socio-cultural perspective means rendering the term illiterate *ad absurdum* and semantically invalid. The fact, that a certain percentage of the world population is called illiterate does not imply that the rest are literate in the above-mentioned sense.

How can this artificially created dichotomy be overcome? How can better interaction of orality and literacy be achieved? And how can the so-called literates and illiterates be involved in solving problems common to all? Throughout this literature survey, while discussing the evolution of fundamental theoretical debates or pointing to various facets of the implementation process, we have attempted to trace and highlight theories and experiences reflecting instances where 'people's wisdom', and ways of communication and expression seem to interact, fuse or merge with literates' knowledge, values and attitudes.

The analysis of several hundred publications, covering a time span of about forty years, indicates some promises and challenges, and suggests just where the finger is being put on gaps in research and action as a result of grappling with some 'magic' key words with seemingly high interactive potential such as PARTICIPATION, RELEVANCE, IMPACT. These terms – pervading the literature mainly after Persepolis and affecting everybody, from progressive to conservative, from North to South, from East to West, dragging behind them kindred clusters of terminologies – remain ambiguous and open to interpretation or even misuse, and are deemed empty if they are not located and discussed within and against the concrete psycho-social, economic, historical, cultural and political situation, as determined by the predominant forces prevailing within groups or societies.

It is difficult to challenge the literature for straight answers to the question of who determined for what interest the respective manifestations of participation, relevance or impact. However, the answers to this issue emerge either vaguely or sometimes more concretely in all chapters of this bibliography.

It may, therefore, be possible to derive from some prevailing, seemingly small, promising ideas – worthy of further investigation and follow-up – the elaboration of different models, transferable and adaptable to various contexts and situations, be it for short-term utilitarian or long-term idealistic objectives.

In this respect, one or several of the following non-exhaustive, loosely ordered features, encompassing the knowledge dimension, the mode of human interaction and the nature of products, either spelled out in the literature or evident from their absence, deserve further consideration:

- investigation of adult learners' characteristics;
- the search for illiterates' life histories in novels, films, songs, poetry, etc.
- learning about illiterates' perception of symbols and visual images;
- investigation into the relationship between oral and written language;
- study of the cultural milieu, i.e. traditional customs and knowledge, ways of expression and communication, learning and earning;
- elaboration of specifically adult fields and forms of knowledge;
- research into the phenomenon of drop-out;
- creation of joint learning situations and episodes for literates and illiterates regarding content and methods, including inter-learning and peer-tutoring;
- exploration of the potentialities of the formal school to promote adult literacy and vice versa (intergenerational effects);
- providing non-formal alternative primary education programmes with autonomous content, methods, learning materials – not necessarily leading back to the mainstream;
- evaluation as a joint effort of literates and illiterates to determine the effects of literacy on the individual and the community;

- strengthening women's literacy by providing joint programmes for men and women, making so-called women's topics also the concern of men, and vice versa;
- recognizing women as a group with a high potential for inter-generational learning;
- stimulating and sharing information exchange on literacy experiences in industrialized and developing countries;
- creating a literating environment evoking motivation and self-directed learning.

An ancient 'Parable on education' may illustrate and support the points made here (this text has been slightly modified from the original):

The Learned Man and the Boatman

The Learned Man approached the Boatman and said: 'Fellow, can you take me across the river?' The Boatman nodded humbly in acquiescence of the Learned Man's request and said: 'Good sir, you are welcome.'

That day the Ganges, the great river of India, was flowing quiet, collected and tamed.

The Learned Man sat at one end of the boat and the Boatman at the opposite end.

Soon they were journeying through the calm waters of the Ganges. The Learned Man sat reflecting on the beauty of the day while the Boatman drudged along rowing the boat.

The Learned Man, pondering over the great learning he possessed, became very proud of himself, but felt very sad that there was nobody else in the vicinity to whom he could express it except a poor illiterate Boatman. Even Learned Men find it difficult to restrain their emotions and he suddenly started to talk to the Boatman.

Learned Man: 'Fellow, can you read?'

Boatman: 'No sir, I cannot read.'

Learned Man: 'Then half of your life is useless.'

The Boatman was very sad at this remark by the Learned Man. The waters kept calm and they continued rowing across the river when the Learned Man interrupted the Boatman with another question.

Learned Man: 'Fellow, can you write?'

Boatman: 'No sir, I cannot write.'

Learned Man: 'Then the other half of you life is also useless!'

The Boatman became very, very sad at this remark of the Learned Man. The boat went on, the further shore still being very far away, for rivers in India are very wide. The Learned Man was very happy at his second triumph and the Boatman very unhappy at his second defeat.

Soon there appeared a change in the weather, for rivers, skies and winds are subject to constant change. There were signs of approaching rain and the winds started blowing hard. The river gradually grew rough and the Boatman rowed with great care. He was getting perturbed at the impending danger and humbly asked the Learned Man: 'Can you, sir, row a boat?' The Learned Man replied: 'No, Boatman, I cannot row a boat.' To this remark of the Learned Man the Boatman laughed and said: 'Then half of your life is useless, Sir!'

The waters of the river grew rougher and the Boatman had more and more difficulty rowing the boat. Great fear entered the mind of the Learned Man and, as he sat helpless, the Boatman interrupted him again.

Boatman: 'Can you, sir, swim?'

Learned Man: 'No, Boatman, I cannot swim.'

Boatman: 'Then the other half of your life is also useless!'

They continued to row along in the dangerous river, but it is said that they never reached the further shore.

(Adapted from a sermon by the Venerable Piyadassi Thero of Vajirarama Temple, Colombo, Sri Lanka.)

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